Housing, Regeneration and Planning

The Scottish Government

Town Centre Regeneration: TCRF Case Studies Report

social research

TOWN CENTRE REGENERATION: TCRF CASE STUDIES REPORT

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1 INTRODUCTION

1.1 The Research Team of Douglas Wheeler Associates Ltd with Slims Consulting, Ryden and Avril Blamey & Associates was commissioned by the Regeneration Division within the Housing and Regeneration Directorate of the Scottish Government to scope out the nature of the outputs and longer term outcomes, to understand how town centre regeneration works and what it can achieve. The purpose of the research was to develop a clearer understanding of the activities taking place as part of town centre regeneration and the outputs and outcomes that follow on from this.

1.2 Fieldwork in the nine Case Study areas was originally undertaken during late April/early May 2010 with some data not being made available until late summer 2010. A second wave of data collection and visits to the Case Study areas was carried out in January/early February 2011. This report reflects the results and conclusions of the January/early February 2011 research.

Town Centre Regeneration Fund

1.3 The aim of the TCRF was to support community and business leaders to regenerate and grow town centres in order to meet the needs of local communities and businesses. The fund was capital only and so could not support non-investment activity. The fund was available from 1 April 2009 to 31 March 2010, with deadlines for applications in June and August 2009. All funding had to be claimed by March 2010. The way in which the TCRF was established with capital only funding, tight deadlines and the criteria used to select projects present challenges in terms of developing effective evaluation plans with the case study projects. Applicants had a **relatively short period of time for the development of applications.**

Selection of Case Study Towns

1.4 The approach used to select the nine case studies was initially informed by:

- Feedback from Local Authorities via an on-line survey carried out in December 2009 that helped establish local authorities who already held some relevant town centre regeneration baseline data and were willing case study participants;
- The detailed review of all 66 successful applications for funding from the Town Centre Regeneration Fund (TCRF) to help identify a typical cross section of TCRF projects;
- Further desk research by and discussions between the Research Team on the availability of data for monitoring the performance of the case study town centres.

1.5 The nine case studies were then selected from a long list based on a number of criteria including the **activity type** of the projects. Here, the emphasis was on physical infrastructure projects to reflect the fact 42% of the TCRF projects focussed on *public realm, accessibility and townscape* improvements. The next most popular primary activities are *housing, leisure & recreation, or community facilities* (28%), and *business, commercial or retail space* (22%). Between them, these three categories account for some 92% of all primary activities.

1.6 A second important criterion was to ensure a representative sample by **geography and town type** using the Scottish Government Urban Rural Classification 2007-2008. The final selection was finalised after discussions with the Research Advisory Group and consultations with the case study project representatives at the first case study workshop in February 2010.

1.7 The nine case study areas selected were:

- Stromness, Orkney Council
- Elgin, Moray Council
- Kirkcaldy, Fife Council
- Kirkintilloch, East Dunbartonshire Council
- Govan Town Centre, Glasgow City Council
- Barrhead, East Renfrewshire Council
- Airdrie, North Lanarkshire Council
- Millport, Argyll and Bute Council
- Jedburgh, Scottish Borders Council

1.8 The selected case study areas are therefore of varying types and scales and are located in very different settings, ranging from: town centres within cities; town centres on the edge of cities; town centres in rural areas; town centres on islands; and larger free standing towns. This presented some challenges to the Research Team in terms of the availability of key data sets.

Initial Proposals for Baselining the Town Centres

1.9 The initial approach to the baseline was based on a number of principles. Essentially the baseline should include a range of economic, social and other indicators that:

- Recognise and reflect the different contexts that town centres operate in;
- Allow comparisons, as far as possible, between town centres;
- Reflect the contribution that town centres can make to the achievement of the GES [1] Purpose targets;
- Follow best practice guidance on town centre performance currently in place and particularly Scottish Planning Policy [2];
- Be honest and practical about what can be delivered and reflect measurement activity currently being undertaken by town centres;

[1] Government Economic Strategy sets out the approach to delivering sustainable economic growth and the National Performance Framework provides details of how progress will be measured.
[2] SPP (February 2010) is a consolidated statement of Scottish Government policy on land use planning

- Acknowledge that identifying specific attribution to TCRF will be a challenge as in most cases the TCRF funding is only one portion of the total cost of the project;
- Build capacity within TCRF projects to track change.

Baseline Data & Town Definition

1.10 Therefore, the baseline data for each case study is presented at three consistent geographical levels:

- A set of contextual measures at the **local authority level**, which described the economic and social context within which town centres with TCRF projects were located;
- A set of **town centre measures** that described the key characteristics of the town centres within which the projects were located;
- A set of **project specific measures** which would describe in detail the activities, outputs and outcomes.

1.11 The baseline data is presented across six key themes. For the purpose of the baseline and in each case study, the relevant town has been defined using the Data Zones identified in the Appendix. Where it has not been possible to obtain relevant information at a data zone level, the baseline has used the relevant Census Area Statistic (CAS) wards that are also identified in the Appendix. The other spatial levels considered in this baseline are the relevant local authority area and Scotland at the national level.

1.12 Data on labour market participation is not available from the Annual Population Survey at the town level and therefore the workless benefit claimant rate has been used as a proxy [3] for labour market participation. Jobseekers Allowance (JSA) has also been used and is a benefit available to people of working age who are unemployed and looking for work. There has been a rapid increase in the number of JSA claimants across the UK over the past eighteen months as a result of the recession.

1.13 The information and data included in the baseline report has been sourced from:

- Published social and economic data at three levels for the town centre, local authority and Scotland;
- Data provided by the case study (e.g. town centre health check and BID data);
- Data from reviewing TCRF applications, Schedule 6 Progress Reports and other documents;
- Face to face and telephone interviews with case study and other contacts as identified.

[3] The workless benefit claimant, JSA claimant, and qualifications data presented in the baseline Tables are not available at data zone level. The figures are based on the CAS wards– the nearest available fit to the local area as defined.

1.14 In developing the baseline, the role of the Research Team was to identify and gather appropriate evidence for both the contextual and the town centre measures. In terms of project specific measures the role of the Research Team was to offer advice and guidance on the appropriateness of project specific measures that have been identified in the original project applications and to collate and report on what data was available. This approach recognised that the Research Team did not expect, nor have the resources to gather data for the project specific measures.

1.15 None of the local authority level data contained in this report has been updated from the baseline report that was revised in November 2010. This is because the vast majority of this data has not yet been updated through publically available data sources. The only exception to this is the data on employment and the business base, which in the original baseline report was reported from the Annual Business Inquiry (ABI). The ABI has now been replaced by the Business Register and Employment Survey (BRES) which is available for 2009. This data set however is not available in a time series any further back than 2008.

Report: Structure

1.16 This report for each case study draws together the key work of the Research Team. For each case study it contains:

- Contextual background to the town/town centre;
- An outline of the TCRF project ;
- A detailed baseline description of socio-economic and other conditions prior to the commencement of the project presented across six key themes;
- Details of progress to date with the project: as at January/early February 2011;
- A review of the project specific performance indicators;
- A summary of the ‘before and after’ performance indicators including activities and the expected project outputs and outcomes;
- A brief conclusion highlighting the effectiveness of the performance indicators related to the emerging Theory of Change.

1.17 The final chapter includes a summary of overall conclusions that have helped to shape the conclusions, findings and recommendations of the Final Report for this research that is presented separately.

1.18 The Research Team is grateful for the assistance from the case study contacts. The remainder of the report summarises baseline for the case studies as follows:

- Chapter 2: Stromness
- Chapter 3: Elgin
- Chapter 4: Kirkcaldy
- Chapter 5: Kirkintilloch
- Chapter 6: Govan Town Centre

- Chapter 7: Barrhead
- Chapter 8: Airdrie
- Chapter 9: Millport
- Chapter 10: Jedburgh
- Chapter 11: Case Studies Baseline: Conclusions

2 STROMNESS

Context and Background

2.1 Stromness is the second largest town on the Orkney Islands and is located on the southwest of the mainland of Orkney. The town had a population of 1,950 in 2008. An established seaport, Stromness was an important Naval Base during the Second World War and is currently linked to the Scottish mainland via a ferry link between Stromness and Scrabster. The town centre stretches for over one mile along the shoreline and is based along a long and winding main street, sheltered by hillside behind.

2.2 A recent study of the local economy carried out on behalf of Orkney Islands Council indicates that Stromness has experienced some socio-economic decline relative to Kirkwall (the largest town on the island). This is evidenced in relatively stagnant population levels over recent decades compared to growth in Kirkwall and the Orkney Islands as a whole, a perceived loss of status, and continued retail expenditure leakage [4].

TCRF Project

2.3 The Stromness TCRF project application is part of wider regeneration efforts that have already begun in Stromness and seeks to complement work ongoing on two specific projects. These are:

2.4 The Pierhead Regeneration Project – the overall project will see the demolition of existing properties to be replaced with a mixed scheme comprising a library, retail and other commercial buildings, and refurbishment of existing buildings. It is anticipated that some Council office accommodation will be created in Stromness as part of the project. The funding from the TCRF will enable the installation of ducting which will enable the future installation of a fibre optic network, which otherwise would not have been possible due to other funding constraints.

2.5 The Townscape Heritage Initiative (THI) – the THI project focuses on the upgrade of the public realm throughout Stromness town centre, replacing current concrete paving slabs with natural stone paving flags. The TCRF funding will allow the flag stone replacement to proceed; otherwise a significantly scaled back option would have been necessary.

2.6 The total costs of the above projects are around £6m, of which around £381k is being provided by the TCRF. The vast majority of this expenditure is attributable to the public realm works as part of the THI project.

[4] Stromness Urban Design Framework, Orkney Islands Council/ WMUD et. al, May 2009

Population

2.7 Table 2.1 shows that Stromness was home to approximately 1,900 people in 2009. This represents an increase of 1% since 2001. Orkney Islands' population increased by 4% over this period and the wider Scottish population increased by 3%.

2.8 58% of the Stromness population are of working age. This is lower than both the Orkney Islands and national averages of 59% and 63%.

Table 2.1: Population

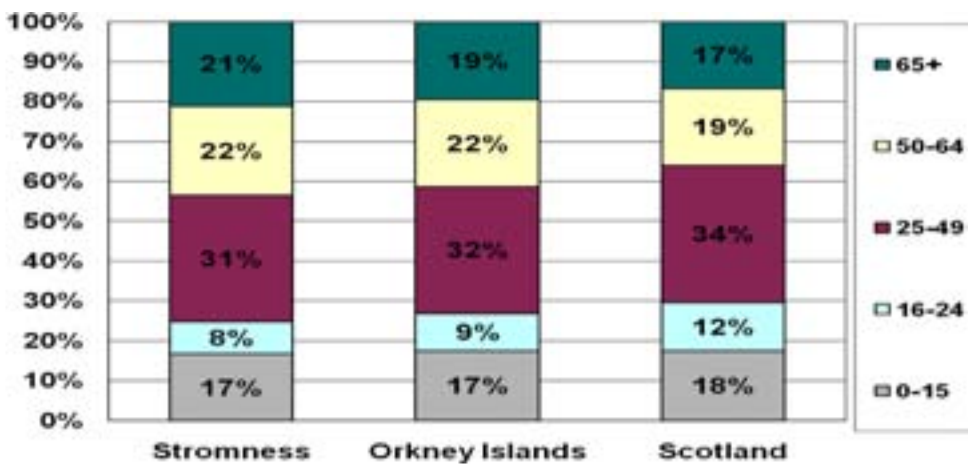
	Stromness	Orkney Islands	Scotland
Total Population 2009	1,900	20,000	5,194,000
Population Change 2001-09	1%	4%	3%
% Working Age 2009	58%	59%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

2.9 Figure 2.2 shows that the age structure of the Orkney Islands' population is broadly similar to that of Scotland. Compared with the Orkney Islands and national averages, the Stromness population is characterised by slightly lower shares of residents who are under the age of 16, youths between the ages of 16 and 24 and those of 'prime' working age (25-49).

2.10 The analysis also reveals that older people over the age of 50 account for around 43% of the Stromness population and this is higher than the Orkney Islands and Scotland averages. Around 22% of the local population is between the ages of 50 and 64; this is the same percentage as Orkney Islands and higher than 19% for Scotland. 21% of the Stromness population is over the age of 65 – this is higher than both Orkney Islands (19%) and Scotland (17%).

Figure 2.2: Age Profile of the Population 2009
(Source: ONS Mid-Year Population Estimates 2009)



Labour Market

2.11 Table 2.3 shows that the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in the Orkney Islands are generally above the national average.

2.12 It can be assumed that labour market participation levels are similar than across Orkney Islands as whole and well above the national average.

2.13 In January 2010, 1.5% of all working age residents in the Stromness area were claiming Jobseekers Allowance (JSA), in line with the equivalent rate for Orkney Islands but lower than that of Scotland average (4.2%).

2.14 Relative to Scotland, the Orkney Islands workforce is less well qualified. 29% of the Orkney Islands working age population are educated to degree level, lower than across Scotland as a whole (34%). On 'no qualifications' Orkney Islands performs marginally better with a slightly lower proportion of the Orkney Islands working population having no qualifications at all – 12%, compared to 13% for Scotland.

Table 2.3: Labour Market

	Stromness	Orkney Islands	Scotland
Labour Market Participation			
Employment Rate	N/A	85%	72%
Unemployment Rate	N/A	3%	7%
Economic Inactivity Rate	N/A	12%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	7.5%	7.7%	14.6%
Jobseekers Allowance Claimant Rate	1.5%	1.5%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	29%	34%
% WAP with No Qualifications	N/A	12%	13%

Local Economy

2.15 Table 2.4 shows that there were approximately 900 jobs in Stromness in 2008, representing an increase of 2% since 2004. This was slightly slower than the rate of growth for Orkney Islands (3%) and across Scotland as a whole (3%). Table 2.5 also shows that 7% of employee jobs in Stromness are based within the financial & business services sector. This is slightly higher than the Orkney Islands average (6%) and well below the national average (19%).

2.16 There were 100 businesses located in the town in 2008 which was 4% lower than in 2004. This rate of decline was in sharp contrast to the growth experienced across both Orkney Islands (7%) and Scotland (8%) over the same period

2.17 When compared with the Orkney Islands and national averages Stromness has a higher business density rate.

2.18 In 2008, there were six businesses per 100 of the population in Stromness. This was above the Orkney Islands average of five as well as the Scottish average of four. This is partly a result of the four key drivers of the local economy identified in paragraph 2.23.

Table 2.4: Local Economy

	Stromness	Orkney Islands	Scotland
Employment			
Number of Jobs 2008	900	8,900	2,420,400
% Change 2004-08	2%	3%	3%
% Jobs financial & business services	7%	6%	19%
Business Base			
Number of Businesses (2008)	100	1,000	181,500
% Change 2004-08	-4%	7%	8%
Businesses per 100 Head of Population	6	5	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

2.19 Table 2.5 shows a breakdown of all jobs by industry in Stromness, Orkney Islands and Scotland. The service sector is by far the largest employer in Stromness and accounts for a larger share of total employment when compared to Orkney Islands and Scotland. For example, *retail & catering* accounts for 38% of all jobs in the town, compared with 10% in Orkney Islands and 22% across Scotland as a whole. Public Sector in Stromness account for some 23% of employment. This is significantly lower than the equivalent rates for Orkney Islands and Scotland – 36% and 30% respectively.

2.20 The percentage of manufacturing activity in Stromness is higher, with the sector accounting for 12% of all jobs in 2008. At a national level, the sector accounts for a smaller share of jobs (9%). Manufacturing in the wider Orkney Islands accounts for a lower share of employment (6%).

Table 2.5: Employment

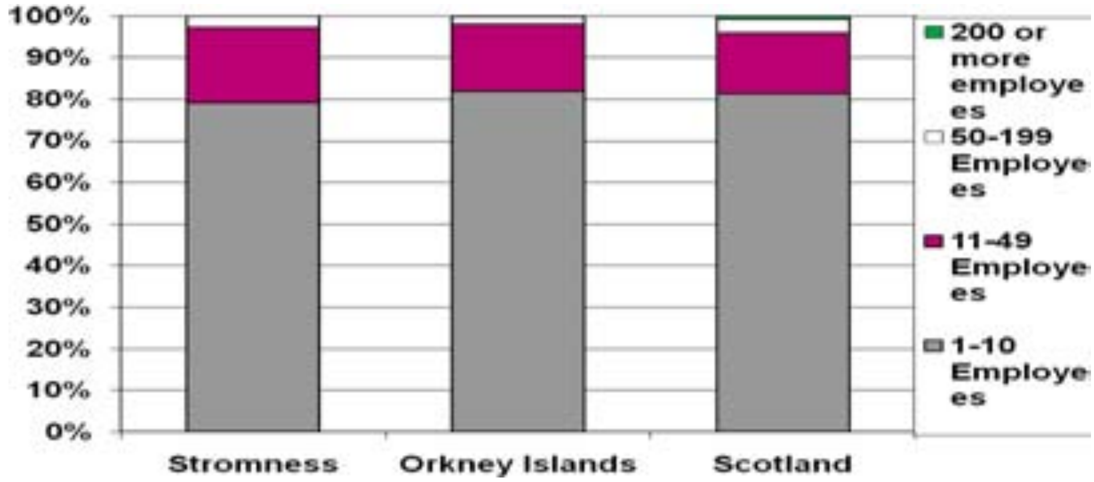
	Stromness	Orkney Islands	Scotland
Total Number of Jobs 2008	900	8,900	2,420,400
% Agriculture & Energy	0%	4%	3%
% Manufacturing	12%	6%	9%
% Construction	6%	10%	6%
% Retail & Catering	38%	24%	22%
% Transport & Communications	8%	10%	5%
% Financial & Business Services	7%	6%	19%
% Public Sector	23%	36%	30%
% Other Services	6%	4%	5%
Source: Annual Business Inquiry (ABI)			

Business Base

2.21 Figure 2.6 shows the profile of the business base in terms of sizeband in the local area, relative to the Orkney Islands and national data. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Stromness, these employers account for a similar share of employment (79%), when compared with Orkney Islands (81%) and Scotland (81%).

2.22 On the other hand, businesses in Stromness with between 11 and 49 employees account for around 18% of all businesses in the area – higher than the Orkney Islands (and national averages of 14%). In 2008 there were no businesses in Stromness which employed between 50 and 199 or more than 200 employees. In the Orkney Islands, 3% of businesses employ between 50 and 199 employees – identical to the equivalent Scottish rate. Scotland is the only area which is represented by businesses employing more than 200 staff (just 1% of all businesses).

Figure 2.6: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))



Tourism

2.23 This section provides an overview of the Stromness tourist market, providing some assessment of the recent performance at an Orkney Islands and national level. Unfortunately, it is not possible to use the data zone definition to look at the tourism market in Stromness as the numbers involved are too small to be disclosed. Table 2.7 shows that the Orkney Islands tourism sector employed around 1,000 people in 2008, representing growth of 23% since 2004. This rate of growth was significantly higher than across Scotland (5%). There were around 100 tourism businesses in the Orkney Islands in 2008 – an increase of around 20% since 2004. This rate of growth significantly outpaced national average of 4%.

Table 2.7: Tourism

Tourism Employment & Workplaces	Stromness*	Orkney Islands	Scotland
Employees (2008)	N/A	1,000	215,000
Change in Employees 2004-2008	N/A	23%	5%
Workplaces	N/A	100	19,500
Change in Workplaces 2004-2008	N/A	20%	4%
Source: Annual Business Inquiry (ABI)			

* Information not available due to confidentiality

Economic Challenges & Drivers

2.24 The analysis and anecdotal evidence suggests that the Stromness economy specialises in four main areas of activity, namely: tourism, food manufacturing, wholesale trade and construction. Collectively these industries have become gradually more important, displacing traditional industries such as agriculture, fishing and port operations. Within this, tourism and food processing are the current key wealth generators in the town, while the creative and renewable energy sectors are identified as presenting strategic opportunities for future wealth creation in Stromness over the decades ahead.

2.25 This is a significant and diverse asset base, remarkable for such a small community, and it is underpinned by active, involved and enterprising community organisations. However, like many peripheral places, the economy of Stromness remains fragile and faces a number of major challenges. These include some which are intrinsic to a remote island community, for example:

- A small labour market pool places limits on expansion and inhibits the development of labour intensive businesses;
- Distance to markets and suppliers may be a constraint on business growth and make it hard to establish high order functions;
- The high cost of travel places a cost premium on business transactions and limits visitor numbers;
- The high level of dependency on the public sector for capital and revenue funding.

2.26 Other challenges include:

- The decline of traditional industries reflected in the closure of the auction mart and the loss of designated fishing port status;
- The loss of the ferry link to Aberdeen a few years ago;
- The long term and continuing drift of activity of all kinds from the historic core of the town to the urban fringe to the north; this is continuing with the planned closure and relocation of the primary school and the library;
- The decline in the number and quality of shops in the town has reduced its vitality and visitor appeal;
- Vacant, underused and deteriorating buildings are damaging the image of the town for visitors and prospective residents;
- Limited supply of office and studio space in the town centre.

Town Centre

Table 2.8: Town Centre Baseline Measures

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	THI awarded 12 property grants which equal £229,177 investment in 2009-10	Not available – Jan 2011?	Recent internal refurbishment of Royal Hotel. Most other investment out with Town Centre
No of Businesses	**120**	Stromness Business Forum	
No of jobs	900	ABI	**OIC refer to 1,300-1,400 inc self employed is considered the reasonable figure** Monitoring new jobs may be the best source for future figures
Retail Performance			
Rental levels	£8-10 sq ft.	District Valuer	
Vacancy levels	5 vacant former retail premises approx 10%	Team Survey – June 2010	One former vacant unit is now occupied and one previously occupied is now vacant, one has recently changed ownership and operation. Commercial Hotel has had funding for refurbishment to include commercial space – work due to commence in 2011.
Range of shops/services	19 Comparison 13 Service 3 Convenience 8 café/rest/pub/hotel 5 vacant	Team Survey – June 2010	Surgery and Com Dev Trust not counted in the numbers
Use and Accessibility			
Parking	Not available: Jan 2011	OIC Road Service	No's still to be confirmed Ongoing exercise of existing and proposed. Restricted Parking Zone project being explored as part of TCRF/THI re-paving.
Pedestrian Flow	Not Available: Jan 2011	OIC Development Services	Will require a survey

Linkages & Catalyst for New Investment

2.27 The TCRF Project is clearly part of a 'suite' of projects targeted at arresting the decline of Stromness town centre as described in paragraph 2.4 above. The

TCRF Town Centre Linkages Project (£381k) is only one part of a wider funding package of around £6m comprising Pierhead, THI and TCRF. The award was for less than the £483k requested because professional fees were ineligible.

2.28 Representatives of the Stromness community, including elected members and business representatives, confirmed the importance to local residents and the business community of sourcing the stone locally and the need to improve the unique 'ambience' and working environment of the centre of Stromness. The alternative was that an inferior and otherwise 'scaled back option' would have been necessary. The view was that businesses in the town centre were **more likely to invest** as a result of the suite of projects that were being delivered.

Project Specific Measures

2.29 The Project performance indicators that have been identified and the various sources are summarised in Table 2.9 below.

Table 2.9: Stromness: Project Performance Indicators

Objectives	Performance Indicators Gathered: Before & After	Source
To upgrade of the public realm throughout Stromness town centre **More Attractive Environment** **Improved Sense of Place**	**Stone Paving** Yes: plan of flagged area sq m improved Before/after photos Before & after perception survey (before was to be completed at Launch of THI in June 2010). Anecdotal evidence from informal interviews with businesses	Sq m improved Contractor Available late 2010/early 2011 Perception surveys to be repeated Follow up interviews with businesses
To enable the installation of a fibre optic network **Stronger Economy: Inward Investment** **OIC Decentralisation**	**IT Infrastructure** None available: need details on -existing and proposed speed/capacity/constraints - take up by OIC & business - number of premises supplied with improved IT infrastructure No of new businesses FTE/PTE Jobs Update town centre survey Number of OIC jobs relocated from Kirkwall	OIC to confirm specification Contractor to provide details of properties served OIC to monitor take up Available late 2010/early 2011 OIC OIC

Addressing Theory of Change

2.30 The table below summarises the review of outputs and outcomes using the emerging Theory of Change (public realm, accessibility and townscape model).

Table 2.10: Stromness: Project Specific Measures: Overview

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
Community & business engagement in design	Number of people attending consult-ation events	Potential increase in Stromness Business Forum	*Increased membership of Stromness Business Group (SBG)* Local quarry continues in operation	Strong resilient SBG Local quarry re-opened and sustained	Member-ship of SBG pre-2010 & post TCRF project completion Monitor quarry business
Improved setting for refurbished vacant/ significant buildings e.g. Commercial Hotel	Remove blight	Potential for OIC job moves to Stromness	More Attractive Environment Improved Sense of Place Local residents & visitors acknowledge improved town centre environment Improved Sense of Pride	**Stronger Economy** - More footfall (residents & visitors) **-** More investment - Increase business relocations/ start ups/ business growth - Increase jobs	Perception surveys to be repeated Repeat number of business/ jobs/ vacancies survey
Improved setting for the Pierhead Regeneration Project	Area improved	More OIC jobs based in Stromness Local residents will make fewer trips to Kirkwall Improved sense of pride in perception surveys		**Reduced Carbon Footprint**	Perception surveys to be repeated Repeat number of business/ jobs/ vacancies survey
Improved events space at Pierhead	Area improved Increased	More visitors, staying longer, spending more	Increase number of events & attendance	**Stronger Economy**	*Number/ type of events*

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
	number of events organised & promoted		Establish spin off impacts for local shops/services		*Footfall survey: residents & visitors*
Improved walking & cycling connectivity	Increased use of public routes	Improved health (increase take-up of healthy lifestyles within the community)		**Reduced Carbon Footprint**	*Footfall & cycle use survey*
Installation of a fibre optic ducting network	Length of fibre optic improved: number of properties served by improved broadband	**Improved IT Infrastructure** - Identified speed & capacity improvements Increase in business start up & business growth in town centre to take advantage of improved broadband	**Inward Investment: new businesses** **OIC decentralisation of services & staff**	**Stronger Economy:**	*Need details on -existing and proposed speed/capacity/constraints* *- take up by OIC & business* Regular business surveys: take up of improved broadband, start up, growth, jobs, confidence *Monitor number of OIC jobs relocated to Stromness*
Renew underground services	Length of pipes/ wires renewed			Ensure services are fit for purpose in future	
Install improved signs	Number of improved signs	More visitors, staying longer, spending more		**Stronger Economy**	*Footfall survey: residents & visitors*

Notes
OIC identified outcomes in bold
Indicators that OIC need to measure in the future are indicated in *italics.*

2.31 Table 2.11 shows the trend over the last four years in the number of cruise ships visiting the various Orkney harbours including Stromness with an average of 69. The cruise ships provide an important source of visitors for organised walking tours with approved guides in Stromness and these visitors will benefit from the improved public realm.

Table 2.11: Orkney Island Council: Visiting Cruise Ships Data

	2008	2009	2010	2011
Cruise Ships	76	66	73	63
Training Ships	3	11	8	0
TOTAL	79	77	81	63
Stromness Pier	11	14	7	5

Progress: Jan/Early Feb 2011

2.32 Progress on site as at January 2011 was as follows:

2.33 **Supply Contract:** Extraction of stone from Liddles quarry is underway and production of paving stone is progressing well. The supplier has procured a second large saw in order to ensure completion of the order by mid March 2011. The first consignment of paving slabs have been delivered to site in order that a stock is on site ready for laying starting in January .

2.34 **Laying Contract:** The paving contractor was ready to start on 29 November 2010 but following consultation with the THI team it was agreed to delay commencement of laying the paving until 6 January 2011. This was so as not to cause disruption and restricted access to local shops in the weeks running up to Christmas which would have been very damaging for public relations.

2.35 The contractor had set up a compound and taken delivery of stone. The work is still programmed to be complete by 31 March 2011 but this does not make any allowance for time lost due to bad weather. An extra team is to be put in place in January/February/March to help expedite the laying works. As the work includes laying an asphalt foundation to the new paving slabs and this requires suitable conditions, it is anticipated there will be some weather delays. It is not possible to predict this in advance but it would be reasonable to assume completion could be delayed until the end of April 2011.

2.36 **Financial:** The first payment under the supply contract will be due on delivery of the stone to site in December with payments complete before the end of March 2011. For the laying contract the first payment will be in January 2011 with a substantial part claimed by the end of March 2011 although some payment will be outstanding until April/May 2011 and some contingency will be required from Scottish Government.

Conclusions

2.37 Stromness TCRF project is part of wider regeneration efforts in Stromness; in particular the THI and the Pierhead Regeneration Project.

2.38 After local community consultation where there was a very strong feeling that the stone for the public realm improvement should be sourced locally, significant and successful efforts were made to reopen a local quarry (Liddles). Clearly the decision to reopen the local quarry has resulted in delays but extraction of stone from quarry is now underway and production of paving stone is progressing well. It would be reasonable to assume completion could be delayed until the end of April 2011 and the overall Pierhead project will not be completed to June 2012. Longer term outcomes will only be clarified at this stage.

2.39 A more robust monitoring and evaluation plan has been established that uses Theory of Change.

2.40 'Team Stromness' has also been established by OIC so as to assist in the coordination and delivery.

2.41 As far as the Stromness contacts are concerned the main issues arising in the TCRF project have been:

- Passion of the local community to insist on locally sourced stone;
- Ability to respond to local opinion and reopen the Liddles quarry;
- Importance of TCRF in convincing local councillors to extend the public realm proposals that were originally part of the THI.

Case Study Interview Details

Main Contact Name	Miriam Frier
Position	THI Project Manager
Organisation	Orkney Islands Council
Phone Number / Mobile	01856 873535
E-Mail	Miriam.frier@orkney.gov.uk
Other Contacts:	
Name	Gavin Barr
Position	Planning Manager (Development Planning & Regeneration)
Name	Mike Cragie
Position	Former Chair Stromness Business Forum

3 ELGIN

Context and Background

3.1 As the largest town within Moray, Elgin is the administrative and commercial centre of the local authority area. The town had a population of 21,000 in 2008 [5], and has an estimated catchment area of around 100,000 people who are attracted to the range of administrative, service, retail and business services available [6].

3.2 The town's large catchment area places it in competition with other regional retail and commercial centres in Inverness and Aberdeen. Therefore, the need to retain a competitive position in this context is a key aspect of local economic development policy. This is reinforced in the Moray Local Plan (2008) which affirms that the town will be the primary focus for future economic development and investment activities, while at the same time a range of 'secondary' towns within the local authority area will also be supported.

TCRF Project

3.3 The concept of the Moray Towns Together TCRF project emerged from Moray Council's strategic approach (see Figure 3.1 below) to enhance the main towns as the economic drivers of the region.

- The project comprises a number of streetscape improvements aimed to make the town centre more accessible to all. These include 'iKiosks' and information points located in car parks;
- The attractiveness of the town centre will be improved by a shop front improvement scheme, streetscape improvements, the purchase of a chewing gum removal machine and street cleaning machine;
- More events will be attracted to the town centre by refurbishment of town centre events facilities;
- The project is linked to the development of the Elgin Business Improvement District (BID) and Moray Towns Partnership (MTP).

Figure 3.1: MTP TCRF Projects
(Source: TCRF Application Form)

Scheme	Location
Street Cleaning Machines	E
East End Streetscape upgrade	E
Plainstones electricity supply upgrade	E
Gateway to the Centre	E
Shop front Improvement Scheme	E, F, B, L
Electronic Tourist Information	E, F, B, L

Outcomes
Increase in footfall in the town centres (+5%)
Decrease business vacancies by (-7)
Indirect job creation (+14)
Direct job creation (+1)
On the job training for 12

[5] Scottish Neighbourhood Statistics

[6] Moray Structure Plan, 2007

Scheme	Location	Outcomes
points		unemployed people
Upgrade to Station Park	L	Improved events capacity (Elgin, Forres & Lossiemouth)
CCTV - James Square & Station Park	L	
Information Boards	L, F	

E = Elgin; F = Forres; B = Buckie; L = Lossiemouth

3.4 Evidence suggests that the main towns in Moray are overshadowed by the major cities and retail outlets of Aberdeen and Inverness. By improving attractiveness and accessibility it is hoped to increase the competitiveness of the towns.

3.5 The overall aim of the project is to support local economies by creating and sustaining jobs and promoting Moray's towns as the economic drivers for the region.

3.6 Moray Council is supporting the development of the Elgin BID and Moray Towns Partnership as part of a wider economic development strategy. The project has overarching social, economic and environmental drivers (comments specific to Elgin are noted below):

3.7 Economic – to increase footfall in the town centre by enhancing its appearance with streetscape improvements and by providing information boards. To attract more events by ensuring the necessary facilities are in place. The improvements are also aimed at reducing vacant shops in the town centre and to address the leaked retail spending to Inverness and Aberdeen.

3.8 Social – by increasing footfall and decreasing business vacancies the projects aim to create and secure jobs in the area, helping to tackle local issues of youth out-migration and low wages.

3.9 Environmental – the project will improve the streetscape of Elgin and make the environment cleaner and safer.

Population

3.10 Table 3.2 indicates that the population of Elgin in 2009 was estimated to be 21,200. This represents a decline of around 1% since 2001. In the same period, the population of Moray increased by 1%, below the Scottish average of 3%.

3.11 60% of Elgin's population are of working age: this is also the case for Moray. These levels are lower than the national average of 63%.

Table 3.2: Population

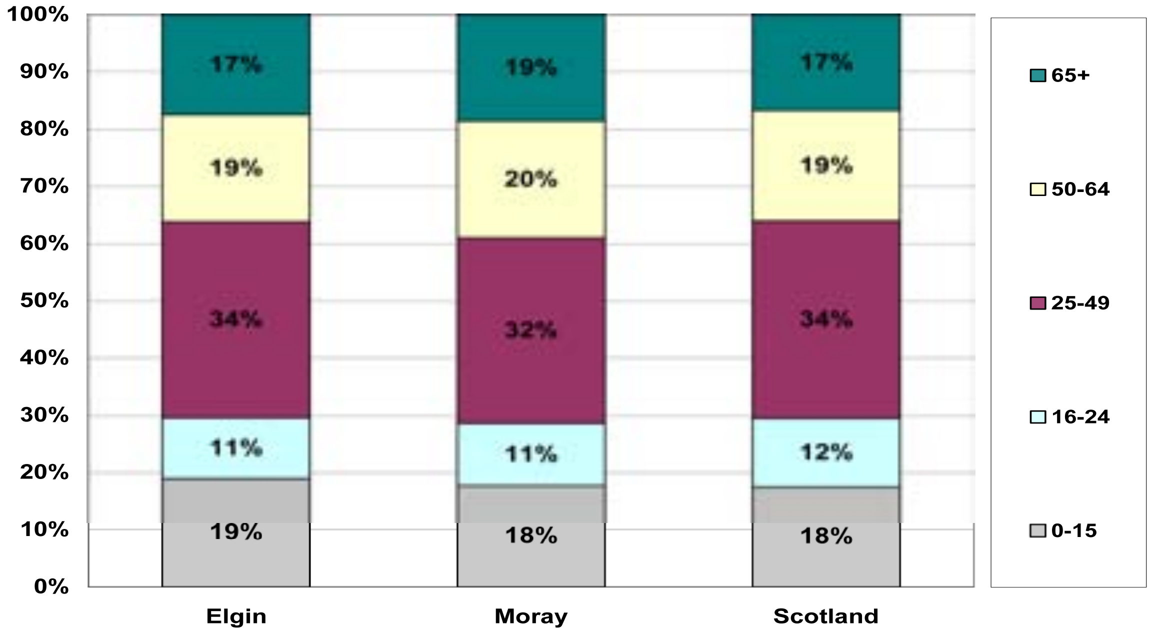
	Elgin	Moray	Scotland
Total Population 2009	21,200	87,700	5,194,000
Population Change 2001-09	-1%	1%	3%
% Working Age 2009	60%	60%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

3.12 Figure 3.3 shows that the age structure of Elgin is almost identical to that of Scotland. There is no difference in the over 25 categories and a difference of 1% in both the 0-15 and 16-24 categories.

3.13 By comparison, Elgin has a slightly lower proportion of those of working age and a larger percentage of those of retirement age.

Figure 3.3: Age Profile of the Population 2009
(Source: ONS Mid-Year Population Estimates 2009)



Labour Market

3.14 Table 3.4 shows that the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in the regional area are well ahead of the national average.

3.15 Using the benefit claimant rate as a proxy for labour market participation, it can be assumed that labour market participation levels are slightly lower in Elgin than Moray as a whole. However, they are still well ahead of Scotland.

3.16 In January 2010, 2.7% of all working age residents in Elgin were claiming the benefit. This is below the Scottish average rate of 4.2%.

3.17 In comparison to Scotland, Elgin's workforce is less well qualified. 27% of the region's working age population are educated to degree level, considerably lower than across Scotland as a whole (34%). However, a lower proportion of the population have no qualifications, 10% as opposed to 13%.

Table 3.4: Labour Market

	Elgin	Moray	Scotland
Labour Market Participation			
Employment Rate	N/A	78%	72%
Unemployment Rate	N/A	5%	7%
Economic Inactivity Rate	N/A	18%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	11.2%	10.2%	14.6%
Jobseekers Allowance Claimant Rate	2.7%	2.8%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	27%	34%
% WAP with No Qualifications	N/A	10%	13%

Local Economy

3.18 Table 3.5 shows that there were approximately 15,000 jobs in Elgin in 2008, representing an increase of 4% since 2004. This increase was greater than Moray as a whole and 1% above the Scottish rate of 3%.

3.19 Only 8% of employee jobs in Elgin are based within the financial & business services sector. This is in line with the regional average, but well below the national average of 18%.

3.20 There were 900 business located in the local area in 2007, representing a 10% increase since 2004. This growth rate was in accordance with Moray but ahead of Scotland. In comparison with regional and national averages, Elgin has a higher business density rate. In 2008, there were five businesses per 100 of the population in the town. This was above the regional average of three per 100 of the population as well as the Scottish average of four per 100 of the population.

Table 3.5: Local Economy

	Elgin	Moray	Scotland
Employment			
Number of Jobs 2008	15,000	34,000	2,420,400
% Change 2004-08	4%	1%	3%
% Jobs financial & business services	8%	8%	19%
Business Base			
Number of Businesses (2008)	900	3,200	181,500
% Change 2004-08	10%	10%	8%

	Elgin	Moray	Scotland
Businesses per 100 Head of Population	4	4	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

3.21 Table 3.6 shows a breakdown of all jobs by industry in Elgin, Moray and Scotland. The service sector is by far the largest employer in Elgin and accounts for a larger share of total employment when compared with Moray and Scotland. For example, retail & catering accounts for 27% of all jobs in the town, compared with 25% in Moray and 22% across Scotland as a whole.

3.22 Levels of manufacturing activity are above the Scottish average in Elgin, with the sector accounting for 12% of all jobs in 2008 compared to 9% in Scotland. This sector in Moray is again higher with a proportion of 17%.

Table 3.6: Employment

	Elgin	Moray	Scotland
Total Number of Jobs 2008	15,000	34,000	2,420,400
% Agriculture & Energy	1%	2%	3%
% Manufacturing	12%	17%	9%
% Construction	6%	7%	6%
% Retail & Catering	27%	25%	22%
% Transport & Communications	3%	4%	5%
% Financial & Business Services	8%	8%	19%
% Public Sector	38%	33%	30%
% Other Services	5%	5%	5%
Source: Annual Business Inquiry (ABI)			

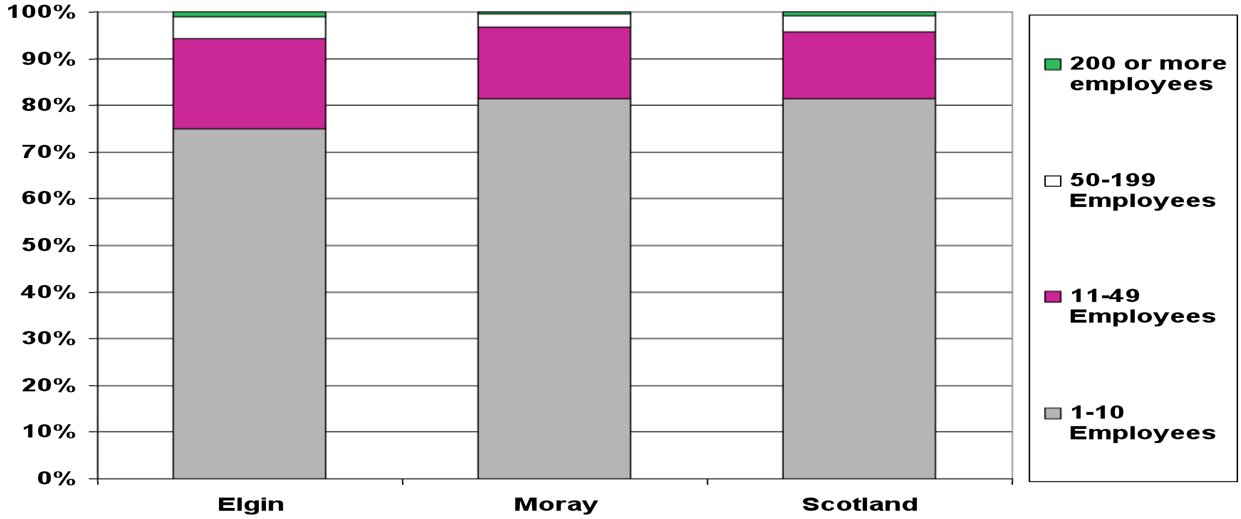
Business Base

3.23 Figure 3.7 shows the profile of the business base in terms of sizeband in the local area, relative to the regional and national areas. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Elgin, these employers account for smaller share of employment (75%), when compared with Moray (81%) and Scotland (81%).

3.24 On the other hand, businesses in Elgin with between 11 and 49 employees account for around 20% of all businesses in the area – above the regional and national averages of 14%.

3.25 In Elgin, 4% of businesses employ between 50 and 199 employees, above the Elgin rate of 2% and the Scottish rate of 3%. Both Elgin and Scotland have 1% of businesses employing 200 or more employees.

Figure 3.7: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))



Tourism

3.26 This section provides an overview of Elgin's tourism market, providing some assessment of the recent performance at a regional and national level.

3.27 Unfortunately, it is not possible to use the data zone definition to look at the tourism market in Elgin and so this section looks at the 2003 CAS wards.

3.28 Table 3.8 shows that the local area's tourism sector employed around 1,200 people in 2008, representing a decline of 19% since 2004. This rate of decline was faster than the regional area (-15%) and against the national trend of Scotland (+5%).

Table 3.8: Tourism

Tourism Employment & Workplaces	Elgin	Moray	Scotland
Employees (2008)	1,200	3,200	215,000
Change in Employees 2004-2008	-19%	-15%	5%
Workplaces	100	400	19,500
Change in Workplaces 2004-2008	3%	1%	4%
Source: Annual Business Inquiry (ABI)			

Town Centre

Table 3.9: Town Centre Baseline Measures

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	34 building warrant applications 60 planning	Council /BID	Data covers BID area which doesn't exactly match defined town

Measure	Specific Data	Source	Comment
	applications (2009 data)		centre.
No of Businesses	Not analysed	-	Detailed data from BID business plan or occupancy level of 435 properties.
No of jobs	-	-	Data not available as town centre is smaller than a single electoral ward.
Land use by type	-	-	Other than BID data on use or local plan this is not available.
Retail Performance			
Rental levels	£35 - £37 per sq.ft Zone A	TCHC	First Town centre Health Check done in 2010
Vacancy levels	15 properties: 6.4%	Council BID TCHC	First Town centre Health Check done in 2010
Range of shops/services	98 comparison 24 convenience 44 retail service 70 leisure service 46 financial & business service 9 health and medical 6 public service 4 religious service 45 general office vacant 15	TCHC	First Town centre Health Check done in 2010
Use and Accessibility			
Parking	AM 38% usage PM 40% usage	Moray Council	Council surveys 10 car parks. Data shown is for St Giles in March 2010.
Pedestrian Flow	Average flows for Sat 18 September 2010 Point A – 618 Point B – 199 Point C – 1,335 Point D – 3,595 Point E – 720 Point F – 693	TCHC	First Town centre Health Check done in 2010

Linkages & Catalyst for New Investment

3.29 Moray is strongly affected by competition from Aberdeen and Inverness and both have benefited from significant recent investment. With a highly mobile population in Moray, the two represent a strong draw for comparison shopping, in particular. As the main commercial and retail centre in Moray it is critical that Elgin has a clear role that acknowledges its position in the retail hierarchy, both within Moray and beyond. This role is supported through robust policy and measures to retain expenditure and capture new development.

3.30 The significant contribution made to the local economy by RAF Kinloss and RAF Lossiemouth also has to be acknowledged. An announcement in 2005 concerning rationalisation and resultant job losses at these bases reinforced the importance of the public sector taking a proactive stance on economic development initiatives to underpin the long term sustainability of the local economy. This also gave a signal to the private sector that intervention will occur. At the time of writing, there is continued uncertainty concerning the future of the RAF presence: it has recently been announced that RAF Kinloss is to be closed and the future of RAF Lossiemouth remains uncertain.

3.31 The project is backed by Business Gateway and Highlands & Islands Enterprise (HIE). The project is also linked to Elgin City of the Future, an initiative that is looking to co-ordinate a number of substantial capital development projects for Elgin over the next 10 years. A consultant team has recently been appointed.

3.32 As part of the shop improvement scheme the owners had to pay 50% of the costs themselves. It is also hoped that the town centre improvements will attract more farmers & international markets as well as other events. It is anticipated that more retailers will be attracted to Elgin and that these will attract more shoppers to the area. These objectives fit with Elgin 'City of the Future' ambitions.

3.33 David Urquhart (Chair of Elgin BID) believes that the TCRF funding was critical to the Elgin project. Already, BID members consider that there has been an improvement in the town centre and furthermore, there is confidence from business owners that the Elgin BID is worthwhile and can achieve results.

Project Specific Measures

Table 3.10: Project: Elgin: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
The overall aim of the project is to support the local economy by creating and sustaining jobs and promoting Elgin as an economic driver for the region. The project will improve the attractiveness and accessibility of the town centre.	Increase footfall	TC Health Check
	Increased retailers' turnover	BID
	Reduced retail leakage	Retail Capacity Study
	Increased units in retail use	TC Health Check
	Improved visitor perception of town centre	TC Health Check
	Improved resident perception of town centre	TC Health Check
	Improved perception of town centre	TC Health Check
	Increased events in TC	Moray Council
	Increased use of Parking	Moray Council
	Vacancy Levels	TC Health Check

Addressing Theory of Change

3.34 The table below summarises the review of outputs and outcomes using the emerging Theory of Change (public realm, accessibility and townscape model).

Table 3.11: Elgin: Project Specific Measures: Overview

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
The overall aim of the project is to support the local economy by creating and sustaining jobs and promoting Elgin as an economic driver for the region. The project will improve the attractiveness and accessibility of the town centre.					
	Purchase of chewing gum and street cleaning machine	Improved environment and appearance of Elgin TC Additional jobs	Enhanced visitor welcome/ experience. Enhanced sense of local civic pride	Increased footfall and local spend	TCHC
	Shop front improvement scheme	Retail facilities fit for purpose Enhanced capital value	Increased range and quality & competitiveness of local retail facilities	Increased footfall and local spend Increased confidence in business community Sustained use of local retail Reduced use of out of town shopping & related car trips	Survey (due to be completed in March 2011)and TCHC
	Signage strategy including orientation boards	Key public places are highlighted, publicised and accessible	Increased awareness of town centre attractions and town heritage	Sustained use of local retail and improved business performance	
	Refurbishment of TC event facilities/ electricity supply	Improved space for meeting and interacting	Locals and visitors use Elgin Town Centre more More events attracted to TC	Increased footfall and local spend Increased social interaction	MC monitoring number of events Number of hits on Tourist Information

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
					Points
	East end project	Improved environment	Enhanced visitor welcome/ experience Enhanced sense of local civic pride	Increased footfall and local spend	TCHC
	A96 underpass	Safer and more pleasant environment	Increase of perceived safety	Less anti-social behaviour, enhanced safety	Crime data

Progress: Jan/Early Feb 2011

3.35 Progress of the Elgin project at January 2011 was as follows:

- The project was largely completed in May 2010. This was slightly behind schedule as a result of working through the winter months and some delays by BT.
- The completed project works include: electricity supply fitted in the Plainstones area; environmental improvements at the east end, northern gateway and western gateway. The installation of Electronic Tourist Information Points, signage and street furniture. The shop front improvement schemes have also been completed.

Conclusions

3.36 The Elgin project was part of the wider TCRF scheme Moray Towns Together.

3.37 The project was completed slightly behind schedule and under budget. The successful execution of the project was due largely to the time and effort put in by Moray Council.

3.38 There has been very positive initial feedback. Some unanticipated developments that have occurred as a result of the project are below:

- Due to the popularity of the shop front improvement scheme the newly formed BID took the decision to offer a similar scheme to interested BID members who missed out on the shop front improvement scheme;
- Royan Butchers benefited from the shop front improvement scheme and also from streetscape improvements at Batchan Lane. The owner of the shop wants to develop an interactive multi media display at Batchan Lane to compliment the heritage theme of the murals already installed;
- The gateway improvements at the A96 underpass lead to an art project which allowed school children to choose their favourite design from short-

listed designs for the public art installation in the underpass. As the school children were directly involved it is hoped that this will stop graffiti;

- The newly formed BID has benefited greatly from the TCR project. There is now a feeling that the BID can have a positive impact on businesses located within the town centre and achieve favourable results;

- Potential partnership for Elgin City Centre Heritage Trial.

3.35 The Elgin TCR team felt that it would have been of benefit for the project if the Scottish Government had:

- Allowed a longer timescale for the application period. This would allow for community consultation to be done on proposals and allowed new proposals to come forward;

- Not to have the development period over winter as the weather lead to project delays.

3.39 In terms of monitoring the TCRF project an annual town centre health check is now in place.

Case Study Interview Details

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Position	Chair of Elgin BID

4 KIRKCALDY

Context and Background

4.1 Kirkcaldy is the largest town in the Fife local authority area and is located between Dundee and Edinburgh, which are both approximately 30 miles away. Kirkcaldy had a population of 50,600 in 2008 [7].

4.2 Historically, textiles have been an important part of the Kirkcaldy economy, and the town established itself as one of the largest linoleum producers in the world in the 1900s. However, the industry began to decline locally from the mid 1960s, and Kirkcaldy's manufacturing base declined sharply in the latter part of the 20th century, similar to many other areas of the UK. This was evidenced by the loss of major employers in the town, including GEC and Babygro, and the closure of the Kirkcaldy's coal mines, which collectively resulted in significant job losses.

4.3 The shift away from dependence on traditional industries towards a more service-based economy is therefore a central plank of economic development policy in Fife. As the area's main commercial, service and leisure centre, Kirkcaldy is earmarked as a strategic priority for expansion and regeneration over the next 20 years in the Fife Structure Plan. Reinforcing the town centre function is seen as critical if the town is to increase its attractiveness and competitiveness relative to other retail centres in neighbouring areas.

TCRF Project

4.4 The Kirkcaldy TCRF project brings together three interlinked projects aimed at enhancing Kirkcaldy town centre and its environs.

- The High Street Streetscape Project will see the replacement of existing paving, lighting and street furniture, with higher quality materials. In addition, Wi-Fi will be installed in the town centre;
- The Green Corridor Project will enhance the visitor arrival experience with public realm improvements at the railway station, museum and memorial gardens;
- The Visitor Signage Strategy will introduce orientation boards and improve the information available to visitors at the points of arrival to the town.

4.5 The overarching aim of the project is to make Kirkcaldy town centre a safe, attractive and vibrant place to live, work, learn, visit, invest in and do business.

4.6 The three projects outlined above form a total investment sum of £7,050,000 within the town centre, of which £2,950,000 is being funded by the TCRF. The remaining funders are Fife Council (£2,850,000); the ERDF (£750,000); and Historic Scotland (£500,000).

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[7] Scottish Neighbourhood Statistics

4.7 Kirkcaldy faces a number of challenges and has been identified as one of three priority areas in Fife. Mid Fife fares worse than the rest of Fife in terms of social deprivation. In addition, there is a high proportion of out-commuting for employment from the area.

4.8 There is currently a large amount of leaked spending from Mid Fife. It is anticipated that the project will give Kirkcaldy a competitive edge, helping to attract top-end retailers and more investment to the town centre. Furthermore, the project should help decrease the levels of vacant units in the town centre.

4.9 The TCRF projects fit with a wider programme of economic regeneration within Kirkcaldy. The town has a potential catchment of 180,000. However, it suffers from extensive competition from a semi-circle of cities and larger towns: Edinburgh, Dundee, Perth, Stirling, Livingston, Dunfermline and Falkirk. Fife Council believes that the town has greater potential to become a retail and seaside destination.

4.10 The implementation of the programme of public realm, access, orientation and environmental improvements, the Conservation Area Regeneration Scheme (CARS) and associated shop front improvements could enhance the image of Kirkcaldy. It is anticipated that there will be increased footfall in the town centre, which could promote increased confidence and activity in the business community.

4.11 The project forms part of a comprehensive strategy to regenerate Kirkcaldy. As a result, planning consents are already in place. The project is led by the Council's transportation team and there is money allocated for the upgrading and maintenance of transport infrastructure over the next decade.

4.12 The CARS scheme, which is being implemented by Fife Council and Historic Scotland, seeks to bring new life to vacant and derelict buildings and to improve the quality of the public realm. Details from the project application and discussion with the case study contacts suggested that the project was designed to:

- Make the town centre more accessible;
- Improve the visual appearance of the town centre and environs;
- Improve tourism facilities;
- Make the town centre a more attractive location for businesses.

Population

4.13 Table 4.1 reveals that the population of Kirkcaldy was estimated to be 51,000 in 2009. This represents an increase of 4% since 2001. Over the same period the population increase in Fife was also 4% which was slightly above the Scottish rate of 3%.

4.14 61% of Kirkcaldy's population are of working age. This is equal to the regional average of Fife and slightly below the national average of Scotland.

Table 4.1: Population

	Kirkcaldy	Fife	Scotland
Total Population 2009	51,000	363,500	5,194,000
Population Change 2001-09	4%	4%	3%
% Working Age 2009	61%	61%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

4.15 Figure 4.2 shows that the age structure of both Kirkcaldy and Fife populations are almost identical to that of Scotland. Compared with the regional and national averages, Kirkcaldy has a slightly higher population of over 65s.

Figure 4.2: Age Profile of the Population 2009
(Source: ONS Mid-Year Population Estimates 2009)

Labour Market

4.16 Table 4.3 shows that the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in the regional area are generally below the national average.

4.17 Using the benefit claimant rate as a proxy for labour market participation, it can be assumed that the 2010 labour market participation levels for Kirkcaldy are considerably behind that of Fife and Scotland which both have levels of benefit claimants of 14%.

4.18 In January 2010, 6% of all working age residents in the Kirkcaldy area were claiming the benefit, above the respective rates of 4% for both Fife and Scotland.

4.19 When compared to Scotland, Fife has the same proportion of population educated to degree level (34%). In addition, a slightly lower proportion of Fife's working population have no qualifications at all, 10% as opposed to 13%.

Table 4.3: Labour Market

	Kirkcaldy	Fife	Scotland
Labour Market Participation			
Employment Rate	N/A	71%	72%
Unemployment Rate	N/A	9%	7%
Economic Inactivity Rate	N/A	22%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	18.0%	14.5%	14.6%
Jobseekers Allowance Claimant Rate	6.0%	4.6%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	34%	34%
% WAP with No Qualifications	N/A	10%	13%

Local Economy

4.20 Table 4.4 shows that there were in the region of 20,800 jobs in Kirkcaldy in 2008, representing a decline of 2% since 2004. This was slower than the rate of decline across the region as whole (5%) and in contrast to growth of 3% across Scotland.

4.21 18% of employee jobs in Kirkcaldy are based within the financial & business services sector. This is above the regional average of 14% but slightly behind the Scottish rate of 19%.

4.22 There were a total of 500 businesses located in the local area in 2007 which was 2% lower than in 2004. This was a slower rate of growth than that experienced across both the region (4%) and the nation (8%) over the same period.

4.23 However, when compared with the regional and national averages, Kirkcaldy has a higher business density rate. In 2008, there were five businesses per 100 of the population in Kirkcaldy. This was above the regional average of three as well as the Scottish average of four.

Table 4.4: Local Economy

	Kirkcaldy	Fife	Scotland
Employment			
Number of Jobs 2008	20,800	128,800	2,420,400
% Change 2004-08	-2%	-5%	3%
% Jobs financial & business services	18%	14%	19%
Business Base			
Number of Businesses (2008)	1,500	10,100	181,500
% Change 2004-08	-2%	4%	8%
Businesses per 100 Head of Population	5	3	4

	Kirkcaldy	Fife	Scotland
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

4.24 Table 4.5 shows a breakdown of all jobs by industry in Kirkcaldy, Fife and Scotland. The service sector is by far the largest employer in Kirkcaldy and accounts for a larger share of total employment when compared with Fife and Scotland. For example, retail & catering accounts for 27% of all jobs in the town, compared with 23% in Fife and 22% across Scotland as a whole.

4.25 Levels of manufacturing activity in Kirkcaldy (8%) are close to the Scottish average of 9%. Manufacturing in the Fife area accounts for an even higher share of employment (13%).

Table 4.5: Employment

	Kirkcaldy	Fife	Scotland
Total Number of Jobs 2008	20,800	128,800	2,420,400
% Agriculture & Energy	0%	2%	3%
% Manufacturing	8%	13%	9%
% Construction	4%	5%	6%
% Retail & Catering	27%	23%	22%
% Transport & Communications	2%	3%	5%
% Financial & Business Services	18%	14%	19%
% Public Sector	37%	33%	30%
% Other Services	4%	7%	5%
Source: Annual Business Inquiry (ABI)			

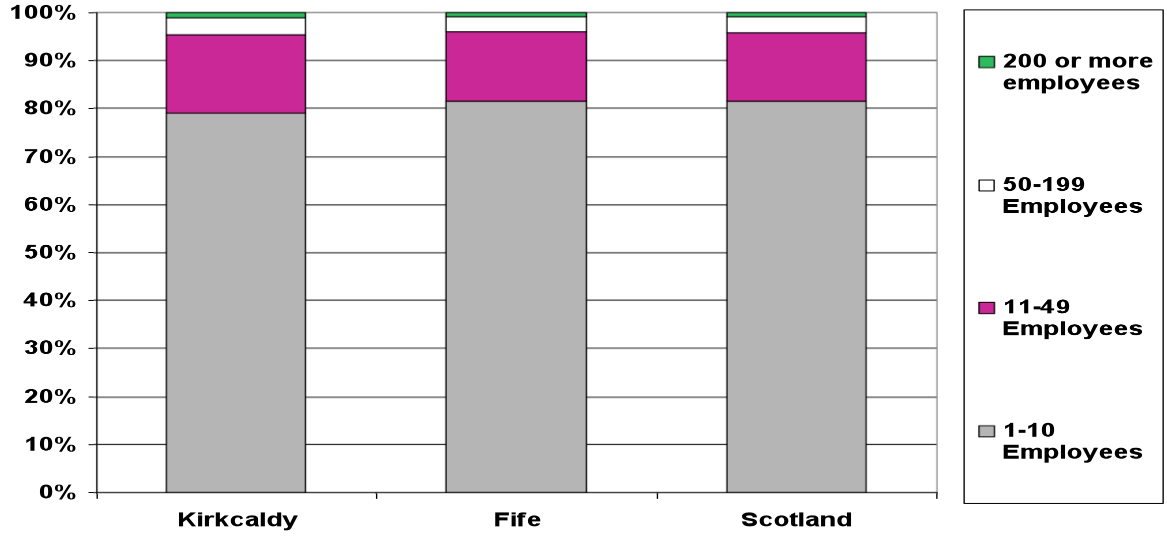
Business Base

4.26 Figure 4.6 shows the profile of the business base in terms of sizeband in the local area, relative to the regional and national areas. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Kirkcaldy, these employers account for smaller share of employment (79%), when compared with Fife (81%) and Scotland (81%).

4.27 Businesses in Kirkcaldy with between 11 and 49 employees account for around 16% of all businesses in the area – greater than the regional and national averages of 14%.

4.28 Across Kirkcaldy, Fife and Scotland, 3% of businesses employ between 50 and 199 employees and 1% of businesses employed over 200 employees.

Figure 4.6: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))



Tourism

4.29 This section provides an overview of the tourism market in Kirkcaldy, providing some assessment of the recent performance at a regional and national level.

4.30 Unfortunately it is not possible to use the data zone definition to look at the tourism market in Kirkcaldy and so this section looks at the 2003 CAS wards.

4.31 Table 4.7 shows that the local area's tourism sector employed around 1,600 people in 2008, representing a decline of 17% since 2004. This rate of decline was faster than the across the region (-2%) and in contrast to the national increase of 5%.

4.32 There were around 70 tourism businesses in the local area in 2008 – an increase of around 8% since 2004. This rate of growth outpaced both the regional and national averages of 4%.

Table 4.7: Tourism

Tourism Employment & Workplaces	Kirkcaldy	Fife	Scotland
Employees (2008)	1,600	11,800	215,000
Change in Employees 2004-2008	-17%	-2%	5%
Workplaces	200	1,200	19,500
Change in Workplaces 2004-2008	2%	11%	4%
Source: Annual Business Inquiry (ABI)			

Progress with the TCRF Project

4.33 At the time of writing, the majority of work has not started, however a contractor had been appointed to undertake the works and a detailed design had been finalised. Consultation and promotion had been undertaken.

4.34 The BID, which replaces the Town Centre Management scheme, has been formed. The BID will be responsible for the installation of the Wi-Fi and Fife Council is responsible for the public realm improvements.

4.35 Delivering the project in the specified time-scale would not have been possible due to the procurement process and sourcing the required materials.

Town Centre

Table 4.8: Kirkcaldy: Baseline Measures (Jan 2010 or proxy)

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	15 Planning Applications	Fife Council Planning Applications	For 2009 2010 applications to be provided
No of Businesses	Not provided	BID	-
No of jobs	-	-	Only available at a town-wide level
Land use by type	-	-	Not measured
Retail Performance			
Rental levels	£55 per sq.ft. Zone A	Ryden	Long run trend data is available and rents also available from some other property agents
Vacancy levels	17%	Experian GOAD	October 2010
Range of shops/services	Assembly - 4 Charity - 11 Comparison - 108 Convenience - 28 Convenience/ Comparison - 2 Food and Drink - 44 Government and Municipal Buildings - 2 Hotel/Hostel - 1 Leisure - 9 Medical - 1 Office - 9 Service - 84 Vacant - 64 Works/Warehouses/ Factories - 2	Experian GOAD	Only available at a ground floor level

Measure	Specific Data	Source	Comment
Use and Accessibility			
Parking	49% town centre car park occupancy	Monthly monitoring and larger 3 yearly survey	2010
Pedestrian Flow	Average weekly shopper visits (Mercat Shopping Centre) of 145,000 rising to a seasonal peak of 250,000	City Site Estates	(Jan – Dec 2007 statistics)

Linkages & Catalyst for New Investment

4.36 The TCRF project is predominately focussed on making streetscape and public realm improvements and it is hoped that as a result, the higher end retailers will be attracted to this area of Kirkcaldy. However, the team realise that the improvements will only go so far. It is hoped that in due course the development of the Strategic Land Allocations will also help to attract new residents and therefore investment to the town centre.

4.37 The funding has been particularly beneficial to the newly formed Kirkcaldy BID. There is now a great deal of dialogue between the BID and the Council, as a liaison group between the parties has been set up as a direct result of the TCRF project. Furthermore, there is a now great deal of confidence in the BID as a result of the implementation of the TCRF project. In addition, the progress of the TCRF project should be of benefit for the proposal to extend the Mercat Centre in Kirkcaldy.

Project Specific Measures

Table 4.9: Kirkcaldy Projects: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
The overarching aim of the project is to make Kirkcaldy town centre a safe, attractive and vibrant place to live, work learn, visit, invest and do business.	Increased local spend	Fife Retail Study
	Increase footfall	Pedestrian counter
	Reduced business leakage to out of centre shopping	Fife Retail Study
	Increased units in retail use	BID Business Plan Town Centre Survey
	Improved visitor perception of town centre	Town Centre Perception Study
	Improved residents' perception of town centre	Town Centre perception study
	Increased events in town centre	BID Manager
	Increased use of car parking	FC Parking Survey

Addressing Theory of Change

4.38 Table 4.10 below highlights the 'results chain' that the research is aiming to confirm with hard evidence. The table below identifies the specific project activities, outputs and outcomes that have been identified by the project and their relationship with the project's objectives. Where appropriate, we have also included town centre performance data from the baseline that will help to track the 'results chain' and performance of the project.

Table 4.10: Kirkcaldy: Project Specific Measures: Overview

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
The overarching aim of the project is to make Kirkcaldy town centre a safe, attractive and vibrant place to live, work learn, visit invest and do business.					
	Replacement of existing paving	Increased quality and safety of Kirkcaldy Town Centre	Improved Local and Visitor perception of Kirkcaldy town centre image	Greater satisfaction and pride with Kirkcaldy Town Centre	Town centre perception survey
	New street and amenity lighting: area	Safer and more pleasant environment	Increase perception of safety	Less anti-social behaviour, enhanced safety	Crime statistics
	New seating/benches: number	Improved space for meeting and interacting	Locals and visitors use Kirkcaldy Town Centre more	Increased local pride/visitor perception of Kirkcaldy TC	Town centre perception survey
	Signage strategy including finger post and orientation boards	Key public places are highlighted, publicised and accessible	Increased awareness of town centre attractions and town heritage	Sustained use of local retail and improved business performance	Town centre perception survey
	Installation of Wi-Fi	Increased Wi-Fi connectivity	Enhanced visitor welcome/ experience	Increased footfall and local spend	Fife Retail Study Wi-Fi usage monitoring Pedestrian counters

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
	Green corridor	Improved environment	Enhanced visitor welcome/ experience	Increased footfall and local spend	Town centre perception survey
	Widening of footpath/cycle ways	Improved and safer access/ environment for pedestrians	More journeys made on foot/cycle Reduced number of short car journeys	Increased environmental sustainability and reduced pollution	Carbon measurement
	Addition of civic spaces	Improved space for meeting and interacting	Locals and visitors use Kirkcaldy Town Centre more	Higher footfall and dwelling times	Fife Retail Study and pedestrian counters
	Refurbishment vacant/ significant buildings/shop fronts (via linkage to CARS)	Key public places are protected, publicised & accessible	Increased awareness & knowledge of town heritage & quality of buildings	Good rental returns. Enhanced capital values/ higher density letting	Fife Retail Study Town centre perception survey

Progress: Jan/Early Feb 2011

4.39 Progress of the Kirkcaldy project at January 2011 was as follows:

- Following a tender process the appointed contractor, Graham Construction Ltd, started onsite in July 2010. At the time of writing, they are currently resurfacing pavements and installing street furniture at various locations in the town centre;

- There has been considerable delay to the project due to the procurement of materials, in particular granite from the Far East. There have also been delays as a result of issues with sub contractors and additional utility diversions;

- Due to the scale of the works taking place in the town centre there is a liaison officer to manage the expectations of affected businesses. Furthermore, the decision was taken that work over the Christmas break would be suspended from 4th December to 4th January to allow shops to trade without disruption;

- The installation of Wi-Fi is due to begin and will be launched in May 2011.

4.40 The project is currently on budget but behind schedule. It is estimated that just over a third of the works have been completed. The completed works are of a very high standard.

4.41 In terms of monitoring there is an annual town centre perception study undertaken by Fife Council, a major traffic survey undertaken every three years and footfall counters are now in place.

Conclusions

4.42 The regeneration of Kirkcaldy town centre is a priority for Fife Council and there are a number of ongoing initiatives that are working towards this. The team at Fife Council are experienced in implementing large scale infrastructure-led projects.

4.43 The project has been well received so far, however, there does not appear to be unexpected results created by the project. This could be because of the 'fit' of the previous and on-going initiatives to regenerate the town centre.

4.44 The BID is working closely with the Council on a number of strategies to help improve the vitality and viability of the town centre. This includes initiatives such as:

- Temporary pop-up shops;
- Targeting certain businesses to locate in the town;
- Retail projects in conjunction with the local college.

4.45 It would have been beneficial for the running of the project if it had not run over the Christmas period as it was felt that the works were very disruptive for businesses during their busiest period.

Case Study Interview Details

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5 KIRKINTILLOCH

Context and Background

5.1 Located on the southern edge of the Kelvin Valley, Kirkintilloch is the administrative centre for the East Dunbartonshire local authority area. Situated approximately eight miles to the northeast of Glasgow, the town had a population of 19,900 in 2008 [8].

5.2 Historically, Kirkintilloch was an important textile centre in the early 1800s, while the completion of the Forth and Clyde Canal in 1790 made the town Scotland's first inland port. The construction of the canal led to further industrial development, in particular nickel works, iron founding and boat building.

5.3 In more recent decades Kirkintilloch has suffered from industrial decline, leading to a number of social and economic problems including unemployment, a decline in the attractiveness of the town centre, poor transport links and a lack of community and leisure facilities.

5.4 Kirkintilloch was identified as a priority for investment through a Town Centre Review in 2007. This led to the formulation of an action plan which is being taken forward through East Dunbartonshire Council's capital investment programme. The Kirkintilloch TCRF submission focuses on the delivery of specific elements of the action plan and proposes three main projects for action:

- Completion of infrastructure works at a vacant EDC/KI owned site in preparation for marketing as a new major retail site.

- Demolition of the Annexe of Kirkintilloch Town Hall to allow the older main structure to come back into operational use, creating a new commercial space.

- Public realm improvements to the Auld Kirk Museum, designed to attract visitors and tourists to the Antonine Wall Heritage Site.

5.5 These project elements are directly linked to future job creation opportunities in Kirkintilloch, and are expected to increase the number of town centre visitors and tourists.

Population

5.6 Table 5.1 shows that there were 19,700 people in Kirkintilloch in 2009. This figure represents a decline of 7% from the position in 2001 and is a faster rate of population decline than experienced across East Dunbartonshire (3%). Across Scotland as a whole, the population grew by 3% over the period.

[8] Scottish Neighbourhood Statistics

5.7 Over three-fifths (61%) of Kirkintilloch's population are of working age. This is lower than the regional and national averages of 60% and 63% respectively.

Table 5.1: Population

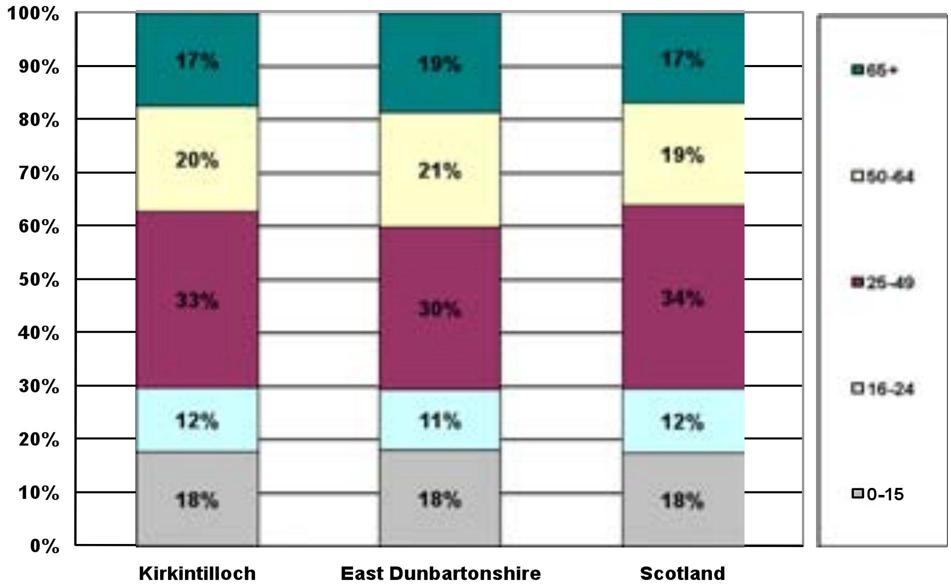
	Kirkintilloch	East Dunbartonshire	Scotland
Total Population 2009	19,700	104,700	5,194,000
Population Change 2001-09	-7%	-3%	3%
% Working Age 2009	61%	60%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

5.8 Figure 5.2 shows that the age structure of Kirkintilloch is broadly similar to that of Scotland. Relative to East Dunbartonshire as a whole, Kirkintilloch has a larger share of young adults within the prime working age group of 25-49 year olds.

5.9 Older people over the age of 50 account for a smaller share of Kirkintilloch's population relative to East Dunbartonshire. In total, 17% of the local population are between the ages of 50 and 64, compared with 19% for East Dunbartonshire.

Figure 5.2: Age Profile of the Population 2009
(Source: ONS Mid-Year Population Estimates 2009)



Labour Market

5.10 Table 5.3 shows that the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in the regional area are generally above the national average.

5.11 Using the benefit claimant rate as a proxy for labour market participation, it can be assumed that labour market participation levels are higher than across East Dunbartonshire as whole, and in line with the national average.

5.12 In January 2010, 4.7% of all working age residents in Kirkintilloch were claiming the benefit - higher than the equivalent rates for East Dunbartonshire (3%) and Scotland (4%).

5.13 Relative to Scotland, East Dunbartonshire's workforce is better qualified. In total, 45% of the region's working age population are educated to degree level, considerably higher than the Scottish average of 34%. Furthermore, a much smaller proportion of East Dunbartonshire's working population have no qualifications at all (7%), compared to Scotland (13%).

Table 5.3: Labour Market

	Kirkintilloch	East Dunbartonshire	Scotland
Labour Market Participation			
Employment Rate	N/A	75%	72%
Unemployment Rate	N/A	6%	7%
Economic Inactivity Rate	N/A	20%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	14.6%	9.6%	14.6%
Jobseekers Allowance Claimant Rate	4.7%	3.0%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	45%	34%
% WAP with No Qualifications	N/A	7%	13%

Local Economy

5.14 Table 5.4 shows that there were 6,800 jobs in Kirkintilloch in 2008, representing a decline of 1% since 2004. This compares with growth of 1% and 3% across East Dunbartonshire and Scotland respectively.

5.15 Just 11% of employee jobs in Kirkintilloch are based within the financial & business services sector. This is below both the East Dunbartonshire average of 17% and the national figure of 19%.

5.16 There were 700 business located in Kirkintilloch in 2008 which was 6% higher than in 2004. This was a slower rate of growth than that experienced across both the region and the nation (both 8%) over the same period.

5.17 Business density levels are the same in Kirkintilloch as across East Dunbartonshire as a whole (both three businesses per 100 population). This compares to a figure of four businesses per 100 population across Scotland as a whole.

Table 5.4: Local Economy

	Kirkintilloch	East Dunbartonshire	Scotland
Employment			
Number of Jobs 2008	6,800	24,400	2,420,400
% Change 2004-08	-1%	1%	3%
% Jobs financial & business services	11%	17%	19%
Business Base			
Number of Businesses (2008)	700	2,900	181,500
% Change 2004-08	6%	8%	8%
Businesses per 100 Head of Population	3	3	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

5.18 Table 5.5 shows a breakdown of all jobs by industry in Kirkintilloch, East Dunbartonshire and Scotland. The public sector is the largest employer in Kirkintilloch, accounting for 35% of total employment. Kirkintilloch therefore has a greater reliance on the public sector as an employer relative to East Dunbartonshire and Scotland where the respective figures are 29% and 30%. The retail & catering sector is also relatively larger in Kirkintilloch, accounting for 28% of all employee jobs in 2008, compared to 26% in East Dunbartonshire and 22% across Scotland.

5.19 In total, 10% of Kirkintilloch's employment is located within the manufacturing sector – this is lower than in East Dunbartonshire (11%) but higher than the Scottish figure of 9%.

Table 5.5: Employment

	Kirkintilloch	East Dunbartonshire	Scotland
Total Number of Jobs 2008	6,800	24,400	2,420,400
% Agriculture & Energy	2%	1%	3%
% Manufacturing	10%	11%	9%
% Construction	6%	7%	6%
% Retail & Catering	28%	26%	22%
% Transport & Communications	2%	2%	5%
% Financial & Business Services	11%	17%	19%
% Public Sector	35%	29%	30%
% Other Services	6%	7%	5%
Source: Annual Business Inquiry (ABI)			

5.20 Over three-fifths (62%) of all employee jobs in Kirkintilloch were full-time in 2008. This was some way below the regional and national averages where 64% and 68% of all jobs respectively are undertaken on a full-time basis.

Business Base

5.21 Figure 5.6 shows the profile of the business base in terms of sizeband in the local area, relative to the regional and national areas. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Kirkintilloch, these employers account for a smaller share of employment (80%), when compared with East Dunbartonshire (86%) and Scotland (81%).

5.22 A greater proportion of businesses in Kirkintilloch employ 11-49 employees compared to East Dunbartonshire and Scotland. Some 17% of businesses in Kirkintilloch fall into this category, compared to the regional equivalent figure of 11% and the national figure of 14%.

5.23 In 2008, 3% of businesses in Kirkintilloch employed between 50 and 199 employees. This is broadly in line with regional (2%) and national (3%) figures. In East Dunbartonshire, 3% of businesses employ between 50 and 199 employees – identical to the equivalent Scottish rate. The percentage of businesses employing more than 200 employees is less than 1% in both Kirkintilloch and East Dunbartonshire, compared to 1% across Scotland as a whole.

Figure 5.6: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))

Tourism

5.24 This section provides an overview of Kirkintilloch's tourism sector, providing some assessment of the recent performance at a regional and national level.

5.25 Table 5.7 shows that the local area's tourism sector employed 700 people in 2008, representing growth of 20% since 2004. This rate of growth was faster than the across the regional area (8%) and the national area (5%).

5.26 There were around 100 tourism businesses in the local area in 2008 – a decrease of 2% since 2004. This compares to growth across East Dunbartonshire and Scotland of 2% and 4% respectively.

Table 5.7: Tourism

Tourism Employment & Workplaces	Kirkintilloch	East Dunbartonshire	Scotland
Employees (2008)	700	2,400	215,000
Change in Employees 2004-2008	20%	8%	5%
Workplaces	100	200	19,500
Change in Workplaces 2004-2008	-2%	2%	4%
Source: Annual Business Inquiry (ABI)			

Town Centre

5.27 Table 5.8 shows the extent to which baseline data on town centre performance was available.

Table 5.8: Town Centre Baseline Measures

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	No quantitative data – though a description of potential investments is given Retailer requirements for 8 operators highlighted in Retail Capacity Study	EDC Town Centre Review (2007) Retail Capacity Study (2009)	EDC Town Centre Review could be amended to capture
No of Businesses	100	Slims Consulting	
No of jobs	700	Slims Consulting	
Retail Performance			
Rental levels	Range from **£14sqft to £50sqft**	EDC Town Centre Review (2007)	
Vacancy levels	Not currently collected		EDC Town Centre Review could be amended to capture
Range of shops/ services	**230 Units on upper and ground floors** – approx 50% are retail	EDC Town Centre Review (2007)	
Use and Accessibility			
Parking	Data on spaces not available. Qualitative description only	EDC Town Centre Review (2007)	EDC Town Centre Review could be amended to capture
Pedestrian Flow	Only described in qualitative terms.	EDC Town Centre Review (2007)	EDC Town Centre update could be amended to capture

5.28 The data provided by the Council was drawn from a Town Centre Healthcheck carried out by EDC in 2007. This is expected to be updated in-house in the summer of 2011. The Council has agreed to consider ways in which to amend the measures that are captured, particularly in terms of quantification, where possible.

Linkages & Catalyst for New Investment

5.29 The case study meeting in February 2011 explored the rationale behind the three investments. East Dunbartonshire Council stressed the three projects were always conceived as part of a wider long term investment plan in the town centre, which had at its heart, the aim of re-orientating retail, commercial and civic activity around the northern end of the old main street.

5.30 At the same time, each of the projects was expected to act as a stimulus for further investment:

- In the case of the site servicing at Glasgow Road it was expected that this would increase the likelihood of a retail investor developing a supermarket at the north end of the town;
- The removal of the town hall was expected to create a commercial development space and create the conditions for the development of a new footpath between the town's retail and historic core;
- The public realm work at the Old Kirk Museum was expected to increase patronage of the Auld Kirk Museum and provide a platform for further visitor related investment in the town both at the Museum and more generally around the theme of the Antonine Wall.

5.31 While the theory behind this in the application appeared simple and straightforward, the site visit and our discussion with the project staff confirmed that the reality of delivery is more problematic:

5.32 The proposed retail site is poorly located in relation to the town centre and is at the bottom of a steep slope. The size and layout of the site, along with the steep slope means it is likely to be unsuitable for a large superstore. There was a recognition that further work would have to be carried out, both in terms of site marketing and potentially further physical interventions around access to bring the site into commercial use. Responsibility for future progress with the site was expected to lie with the Local Authority but no funding had been identified to progress these elements.

5.33 The future development of the Town Hall Annex site is inextricably linked with the future of the (currently derelict) Town Hall. A local preservation group recently commissioned a feasibility study into the future of the Town Hall, which failed to identify any commercially viable uses for the building. There was recognition that future commercial development of the annex site was unfeasible until this wider issue was resolved. There was no clear timeline around when this resolution might take place.

5.34 The Council recognised that to meet the stated aspiration of creating a walkway between the town's retail core and the town's historic core, of which the removal of the town hall annex was a first step, would require further investment. This would involve a significant public realm intervention to enhance the quality of the existing footpath and the removal of an 8ft high wall currently blocking the proposed path.

Project Specific Measures

5.35 The table below highlights the project specific measures for the TCRF project.

Table 5.10: Kirkintilloch: Project Specific Measures: Overview

<table>
<tr><th>Objectives/ Activities</th><th>Outputs</th><th>Short Term Outcomes: 2011</th><th>Interim Term Outcomes: 2013</th><th>Longer Term Outcomes: 2015+</th><th>Measure In Place</th></tr>
<tr><td rowspan="6">The project involves:

Capital investment in a vacant Council owned site to support the creation of new retail premises

Redevelop-ment of town hall leading to commercial re-use

Public realm improvements at Auld Kirk Museum</td><td>Increased spend on suppliers & initial jobs related to regeneration work</td><td>Supporting local construction jobs – 98 jobs</td><td>Retail employment – 317 jobs</td><td>Increased inward investment</td><td></td></tr>
<tr><td>Key public places are protected, publicised & accessible</td><td></td><td>Town hall employment – 22 jobs</td><td>Influence quality of future development</td><td></td></tr>
<tr><td>Refurbished vacant building</td><td>Increased awareness & knowledge of town heritage & quality of buildings</td><td>Improve retail mix/ quality & retail income</td><td>Improved quality of life</td><td></td></tr>
<tr><td>Improved civic spaces for events, meeting & interacting</td><td>Improved accessibility to buildings</td><td>Good rental returns. Enhanced capital values/ higher density letting</td><td>Enhanced visitor welcome/ experience</td><td>Places where people want to live and work & which enhance their quality of life</td></tr>
<tr><td>Improved appearance of town centre</td><td></td><td>Sustained use of local retail, improved business performance</td><td>Locals (&visitors) perceive the town has an improved image</td><td></td></tr>
<tr><td></td><td></td><td>Increased footfall & local spend</td><td></td><td></td></tr>
</table>

			(not quantified)		

Progress: Jan/Early Feb 2011

5.36 At the site visit in February 2011, progress had been made with two out of the three activities:

- The public realm work at Auld Kirk Museum had been completed in the summer of 2010;
- The Town Hall Annex had been removed and the space utilised as a temporary car park for town centre users.

5.37 The servicing work for the supermarket site had not been completed by February 2011, with the severe winter weather in November and December 2010 cited as the reason for a delay to planned works.

Conclusions

- The project focuses on three physical investments, each of which was part of a long term plan to regenerate and re-orientate the town centre;
- By February 2011 two elements of the TCRF project had been completed, and the final element was expected to be completed by the end of March 2011;
- Data on town centre performance was expected to be updated through a Town Centre Health Check in 2011. The Council is considering adopting greater quantification of data to strengthen town centre monitoring;
- The levels of employment outcomes anticipated in the original application are unlikely to be met in the short term, as the TCRF projects were seen as the initial investments in a longer term regeneration plan;
- The timing of future investment activity remains highly uncertain in the light of current public and private property markets.

Case Study Interview Details

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6 GOVAN

Context and Background

6.1 Govan is a district of Glasgow, located approximately three miles from the city centre and located on the south bank of the River Clyde. Lying north of the M8, Govan is well served by transport links with good road, bus and underground network links to the rest of the city. In 2008, the area had a population of 66,100 [9].

6.2 Govan's history is indelibly linked to its shipyards, with the area at the heart of the worldwide shipbuilding industry in the late 1800s and the first part of the 20th century. However, long-term decline of the industry on the Clyde following the post-war period has drastically reduced shipbuilding within the area and today there is just one operating shipyard located within Govan [10]. This long-term industrial decline has been one in a range of factors which have contributed to significant levels of economic, physical and social deprivation in the area over recent decades.

6.3 In response, concerted efforts are being made by local policy makers in an attempt to arrest the decline in the town and surrounding areas of Govan. In this context, key town centre regeneration projects in the area are taking place within the framework of the Central Govan Action Plan (CGAP) and the Govan Townscape Heritage Initiative (THI).

6.4 The CGAP is a ten-year, £120m programme, co-ordinating investment in a range of regeneration activities including public realm improvements, historic building renewal, new mixed tenure housing, shop front improvements, community and leisure facilities, and landscape and infrastructure improvements. Forming part of the CGAP, the THI provides grant-based funding from the Heritage Lottery Fund, the aim of which is to regenerate conservation areas in towns that have suffered from acute social and economic problems.

6.5 The successful Govan TCRF application sought funding for two specific projects which from part of the CGAP and THI investment programmes. These were:

- **Roof repair works to the Pearce Institute,** a Category A listed community and landmark building at Govan Cross. This would be the initial stage of planned restoration, with the full schedule of planned improvements ultimately expected to improve the building's viability and sustainability as a community and business resource.

[9] Scottish Neighbourhood Statistics

[10] This refers to the BAE Systems facility, which is still located within the heart of the area.

- **Public realm improvements at three key sites at Govan Cross** – namely the square and forecourts of both the shopping centre and underground and bus station. These improvements are primarily aimed towards improving the attractiveness, accessibility and cleanliness of the Govan Cross area.

6.6 Collectively, these two projects amount to investment of nearly £4.6m in the Govan area, around £3.3m of which had already been secured from other sources prior to the TCRF application being lodged. The remaining £1.3m of TCRF monies sought was therefore intended to make up the funding shortfall.

Population

6.7 Table 6.1 shows that Govan was home to approximately 66,600 people in 2009. This represents an increase of 1% since 2001. The Glasgow City population increased by 2% over this period and the wider Scottish population increased by 3%.

6.8 Seventy per cent of the Govan population are of working age. This is higher than both the Glasgow City and national averages of 67% and 63% respectively.

Table 6.1: Population

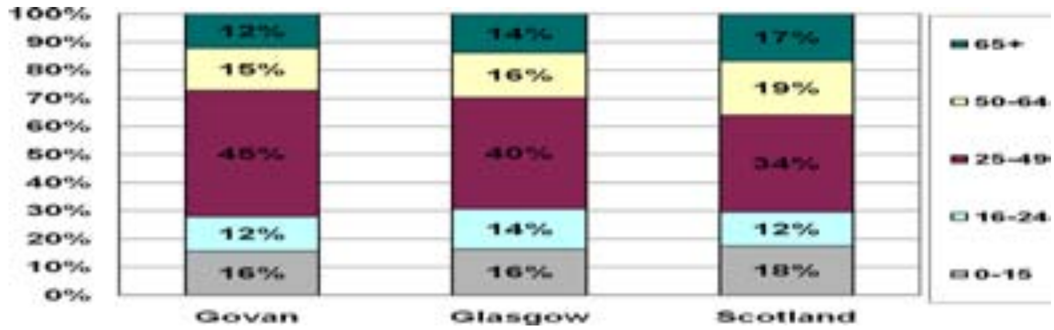
	Govan	Glasgow	Scotland
Total Population 2009	66,600	588,500	5,194,000
Population Change 2001-09	1%	2%	3%
% Working Age 2009	70%	67%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

6.9 Figure 6.2 shows that the age structure of the Glasgow City population has higher proportions of 16-24 and 25-59 age groups and smaller proportions of 50-64 and 65+ age groups than the national averages. Compared with the Glasgow City and national averages, the Govan population is characterised by a significantly higher proportion of 25-49 age group and slightly lower shares of residents who are in the 50-64 and 65+ age groups.

6.10 The analysis also reveals that people over the age of 50 account for around 27% of the Govan population, which is lower than the Glasgow City (30%) and Scotland (36%) averages. The over 65 proportion is 12% – this is lower than both Glasgow City (14%) and Scotland (17%).

Figure 6.2: Age Profile of the Population 2009
(Source: ONS Mid-Year Population Estimates 2009)



Labour Market

6.11 Table 6.3 shows the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in Glasgow City are below the national average.

6.12 Using the benefit claimant rate as a proxy [11] for labour market participation, it can be assumed that labour market participation levels are similar across Glasgow as whole, and lower than the national average.

6.13 In January 2010, 5.8% of all working age residents in the Govan area were claiming the benefit, generally in line with the equivalent rate for Glasgow City and higher than that of the Scotland average (4.2%).

6.14 Relative to Scotland, the Glasgow City workforce is less well qualified, with 32% of the Glasgow City working age population educated to degree level, lower than across Scotland as a whole (34%). Furthermore, a higher proportion of the Glasgow City working population have no qualifications at all – 20%, compared to 13% for Scotland.

Table 6.3: Labour Market

	Govan	Glasgow	Scotland
Labour Market Participation			
Employment Rate	N/A	62%	72%
Unemployment Rate	N/A	10%	7%
Economic Inactivity Rate	N/A	31%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	19.9%	22.1%	14.6%
Jobseekers Allowance Claimant Rate	5.8%	6.0%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	32%	34%
% WAP with No Qualifications	N/A	20%	13%

[11] The workless benefit claimant, JSA claimant, and qualifications presented in Table 1.2 are not available at data zone level. The figures are based on the wards of Govan– the nearest available fit to the local area as defined in paragraph 7.18.

6.15 Table 6.4 shows that there were approximately 57,100 jobs in Govan in 2008, representing an increase of 6% since 2004. This was slightly higher than the rate of increase across Glasgow City as whole (5%) and higher than the growth of 3% across Scotland as a whole. Eighteen per cent of employee jobs in Govan are based within the financial & business services sector. This is slightly lower than the Glasgow City average (28%) and similar to the national average (19%).

6.16 There were 3,200 business located in Govan in 2008 which was 5% increase from 2004. This rate of increase was higher than the Glasgow City (2%) and lower than the Scotland (8%) increases over the same period.

6.17 When compared with the Glasgow City and national averages, Govan (five businesses per 100) has a higher business density rate than Glasgow City (4) and the Scotland average (4).

Table 6.4: Local Economy

	Govan	Glasgow	Scotland
Employment			
Number of Jobs 2008	57,100	413,500	2,420,400
% Change 2004-08	6%	5%	3%
% Jobs financial & business services	18%	28%	19%
Business Base			
Number of Businesses (2008)	3,200	20,800	181,500
% Change 2004-08	5%	2%	8%
Businesses per 100 Head of Population	5	4	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

6.18 Table 6.5 shows a breakdown of all jobs by industry in Govan, Glasgow City and Scotland. The service sector is by far the largest employer in Govan and accounts for a larger share of total employment when compared to Glasgow City and Scotland. For example, *retail & catering* accounts for 27% of all jobs in Govan, compared with 20% in Glasgow City and 22% across Scotland as a whole. *Public Sector* jobs in Govan account for some 30% of employment. This is similar to the equivalent rates for Glasgow City and Scotland – 31% and 30% respectively.

6.19 The percentage of manufacturing activity in Govan at 5% is similar to the Glasgow City average with the sector accounting for only 5% of all jobs in 2008. At a national level, the sector accounts for a larger share of jobs (9%).

Table 6.5: Employment

	Govan	Glasgow	Scotland
Total Number of Jobs 2008	57,100	413,500	2,420,400
% Agriculture & Energy	0%	1%	3%
% Manufacturing	5%	5%	9%
% Construction	7%	4%	6%
% Retail & Catering	27%	20%	22%

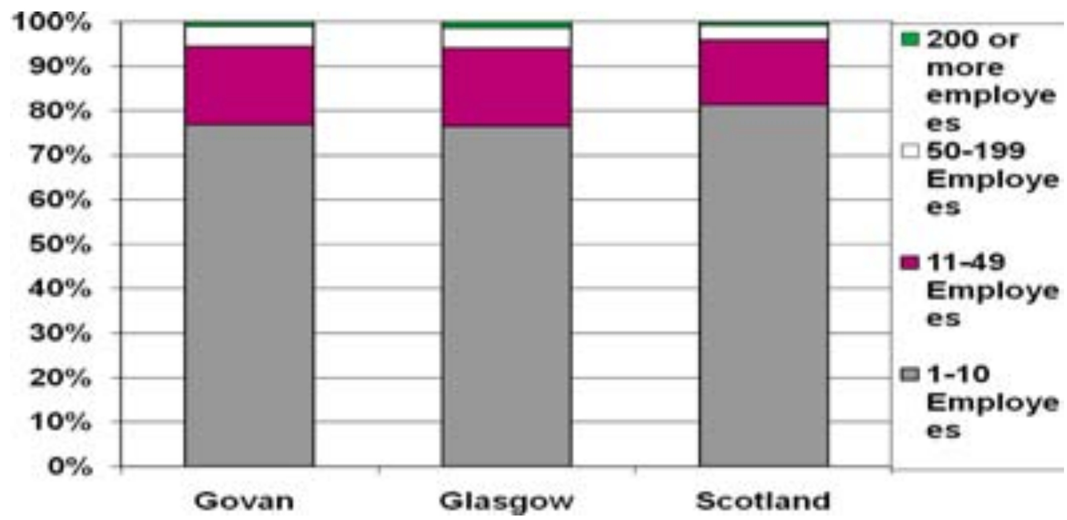
	Govan	Glasgow	Scotland
% Transport & Communications	5%	5%	5%
% Financial & Business Services	18%	28%	19%
% Public Sector	30%	31%	30%
% Other Services	8%	5%	5%
Source: Annual Business Inquiry (ABI)			

Business Base

6.20 Figure 6.6 shows the profile of the business base in terms of sizeband in the local area, relative to Glasgow City and national data. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Govan, these employers account for a similar share of employment (77%), when compared with Glasgow City (77%) and Scotland (81%).

6.21 On the other hand, businesses in Govan with between 11 and 49 employees account for around 18% of all businesses in the area – similar to the Glasgow City average but lower than the national average of 14%. In 2008 there were 5% of businesses in Govan which employed between *50 and 199* or *more than 200* employees. In Glasgow City, 5% of businesses employ between 50 and 199 employees – higher than the equivalent Scottish rate. In Govan and Glasgow City just 1% of all businesses employ more than 200 staff and again this is similar to the Scottish rate.

Figure 6.6: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))



Tourism

6.22 This section provides an overview of the Govan tourist market, providing some assessment of the recent performance at a Glasgow City and national level.

6.23 Table 6.7 shows that the local area's tourism sector based on the 2003 ten CAS wards employed around 3,700 people in 2008, representing growth of 6% since 2004. This rate of growth was faster than across Glasgow City (0%) and Scotland (5%). There were around 300 tourism businesses/workplaces in the local area in 2008 - a decrease of around 2% since 2004. This rate of decline was less than the Glasgow City average but was outpaced by the national average of 4%.

Table 6.7: Tourism

Tourism Employment & Workplaces	Govan	Glasgow	Scotland
Employees (2008)	3,700	30,000	215,000
Change in Employees 2004-2008	6%	0%	5%
Workplaces	300	2,100	19,500
Change in Workplaces 2004-2008	-2%	-6%	4%
Source: Annual Business Inquiry (ABI)			

Town Centre

Table 6.8: Town Centre Baseline Measures

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	£67.4M in 502 housing units between 2007 and 2010	GSWRA	
No of Businesses	42 in 2008	GCC DRS Economic & Social Indicators	Govan TC Data Zone
No of jobs	252 FT 144 PT **396**	GCC DRS Economic & Social Indicators	Govan TC Data Zone
Retail Performance			
Rental levels	Not available		
Vacancy levels	29 or 23% of total	GCC DRS	
Range of shops/services	Comparison: 20 Convenience:21 Service: 58 Vacant: 29 **Total: 128**	GCC DRS	
Use and Accessibility			
Parking	25 Jan 2011: 300 cars parked in Govan Cross Area.	CGAP	

<table>
<tr><th>Measure</th><th>Specific Data</th><th>Source</th><th>Comment</th></tr>
<tr><td colspan="4">Survey area: Govan Road, Water Row, Pearce Lane, Pearce Street, McKechnie Street, Rathlin Street, Harmony Row and Burleigh Street.
Note: Half of the Water Row Car park area was closed off due to the works at the square.
</td></tr>
<tr><td>Pedestrian Flow</td><td>25 Jan 2011: 106,460 total footfall recorded in 15 intervals</td><td>GXSC Management statistics</td><td></td></tr>
<tr><td colspan="4">Survey Area: The Square, The Portal, Langlands Road and SPT Forecourt.
</td></tr>
</table>

Linkages & Catalyst for New Investment

6.24 Although the TCRF funding was a minor funder in the restoration costs of the Pearce Institute, as there was a shortfall, the TCRF funding was crucial to the project going ahead. Anne McChlery, Director, Glasgow Building Preservation Trust, who is key partner on the Pearce Institute project, highlighted firstly the historic, architectural and cultural significance of the landmark building and secondly the *'pivotal nature of TCRF funding for the roof repairs'*.

6.25 Anne McChlery pointed out that progress at the Pearce Institute should have a 'galvanising' effect on regeneration of the wider town centre and possibly accelerate ambitious plans for Old Govan Parish Church as a visitor attraction, new river crossing to the relocated Transport Museum and strengthen links to the BBC/STV at Pacific Quay and possibly the investment at the Southern General Hospital. David Herring, Project Consultant for Rockspring Hanover Property Unit Trust (owners of Govan Shopping Centre), pointed out that TCRF funding was 'timely' in helping to maintain investment and stabilise the Shopping Centre at a difficult time in the recession and help convince new occupiers to take space.

Project Specific Measures

6.26 The project performance indicators that have been identified and the various sources are summarised in Table 6.9 below.

Table 6.9: Project: Govan Cross Public Realm: Performance Indicators

Objectives	**Performance Indicators Gathered/available: Before & After**	**Source**
To create an attractive, vibrant and successful space that is well used and valued by local people and visitors alike, and promotes community and investor confidence. Govan Cross should have a visually cohesive appearance using traditional materials to reflect its Conservation Area status. See outputs on table 6.12 below for specific activities	Increase footfall	GXSC management statistics
	Increased retailers' turnover	Retailers' survey
	Reduced business leakage	GCC DRS City Plan Team
	Increased units in retail use	GCC DRS City Plan Team
	Improved visitor perception of town centre	GCC City Plan Physical Environmental quality rating
	Improved residents' perception of town centre	Place making Scores June 2008 Annual street survey
	Increased events and opportunities to socialise at Govan Cross	Survey of events

Table 6.10: Project: Pearce Institute Re-roofing: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
To make the Pearce Institute wind and water tight, improving both the quality of the space and the financial viability of the organisation through saved energy costs and preserving the building for future generations to enjoy.	Increased footfall	PI visitor numbers
	200/week in 2009 600/week in 2010	Café Pearce visitor numbers
	Stabilised/increased rental income for the Pearce Institute	PI Business Plan
	Stabilised/increased lets/use of Pearce Institute	PI Business Plan
	Improved visitor perception of Pearce Institute *Average satisfaction rating very good*	PI visitor survey

Addressing Theory of Change

6.27 The table below summarises the review of outputs and outcomes using the emerging Theory of Change (public realm, accessibility and townscape model).

Table 6.11: Govan Town Centre: Project Specific Measures – Pearce Institute

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
To make the Pearce Institute wind and water tight, improving both the quality of the space and the financial viability of the organisation through saved energy costs and preserving the building for future generations to enjoy.	Area of roof fully restored on programme Rainwater goods refurbished or replaced Stonework top chimneys repaired Floodlighting scheme installed Solar Panels installed	Improve the sense of optimism in the Pearce Institute and Central Govan's regeneration Improve quality of lettable space Stabilised/increased rental income for the Pearce Institute Early improvements in the financial viability of the Pearce Institute	Improve the financial viability of the Pearce Institute – lowered energy and maintenance costs Increased footfall Increase number of events & profitability	**Preserving the building for future generations to enjoy**	Yes via plans/specifications: contractor Monitoring visitor numbers Yes via repeated visitor /user surveys Improvements in finances via annual business plan updates/ accounts

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
	Architectural features repaired including Leaded windows Plaster work reinstated in Macleod hall & tiered seating removed	Areas (sq m) improved	Improved visitor perception of Pearce Institute Increased use of Macleod Hall	**Preserving the building for future generations to enjoy**	Yes as above Visitor/user perception surveys
	Number of new entrant jobs	Number confirmed			Yes but longer term tracking of individuals' progress will be required
	Number of apprenticeships	Number apprenticeships confirmed	Number still in employment		As above
	Number of new entrant qualifications	Number confirmed	Number in employment		As above
	Number of work experience placements	Number confirmed	Number still in employment		As above
	Number of lifelong learning opportunities for existing staff	Number confirmed			

Table 6.12: Govan Town Centre: Project Specific Measures – Govan Cross Shopping Centre & Underground Forecourt

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
To create an attractive, vibrant and successful space that is well used and valued by local people and visitors alike and promote community and investor confidence. Govan Cross should have	Area of new paving installed New street and amenity lighting: area New seating/ benches: number New bins, cycle racks and bollards: number Engraved stone	Increased attractiveness, comfort and sociability of the space	**Govan Cross should have a visually cohesive appearance using traditional materials to reflect its Conservation Area status**	**Improved residents and visitors perceptions Community and investor confidence.** New business relocations/start ups & existing business growth Increase in jobs	Repeated: residents & visitors perception survey Repeated: units in retail use & retailers turnover survey

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
a visually cohesive appearance.	work				
		Increased sense of cohesion for Govan Cross between The Square, Water Row and Underground sites	Increase footfall	As above	Yes Footfall survey
		Increased footfall and profitability of shops	Increased retailers' turnover	As above	*Not specific: Business Turnover Survey*
		Increased sense of pride and care of the space	Reduced business leakage	As above	*Not specific: Business leakage*
			Increased units in retail use		Yes Retail survey
		Increased sense of cohesion for Govan Cross between The Square, Water Row and Underground sites	Improved visitor perception of town centre	As above	Yes
		Increased events and opportunities to socialise at Govan Cross	Number/type of events & attendance	As above	*No: need to monitor*
	Number of work placements	Number confirmed	Number still in employment/training		*No: need to monitor*

Notes
GSWRA identified outcomes in bold
Indicators that GSWRA need to measure in the future are indicated in *italics*

6.28 The results below are based on 100 customer surveys that were carried out by Govan Cross Shopping Centre in January 2011.

Table 6.13: Govan Perception Survey: January 2011

	Yes	No	Same
Do you feel the space outside the shopping centre is more attractive?	71%	14%	15%
Does the improved space make you come to the shopping centre more often?	24%	28%	48%
	Improving	**Same**	**Worse**
How do you feel about Govan Cross Town Centre as a whole?	76%	12%	12%
Source: GXSC			

Progress: Jan/Early Feb 2011

6.29 In May 2010 offers of grant had been prepared for each project based on the full TCRF allocation of £1.3m and all contracts were in the process of being awarded. By November 2010 total TCRF spend was £0.67m.

6.30 Work started on the Pearce Institute building in March 2010. The estimated completion date has slipped from March 2011 to April 2011.

6.31 Contractors were appointed for The Square in March 2010 and started on site in June 2010, three months behind schedule. The work was completed by February 2011.

6.32 SPT had to redesign part of the Underground forecourt site, which delayed their site start by six months. As a result the work was not completed until the end of January 2011, five months behind schedule.

6.33 Work on the Shopping Centre public realm improvements commenced in March 2010 slightly behind schedule. Due to problems with workmanship a range of remedial repair works had to be carried out and the project was completed at the end of August 2010.

Conclusions

6.34 The TCRF projects are taking place within the framework of the Central Govan Action Plan (CGAP) and the Govan Townscape Heritage Initiative (THI).

6.35 Working up and delivering the TCRF projects has significantly improved relationships with key partners including Govan Cross Shopping Centre and SPT.

6.36 The ‘pivotal’ nature of TCRF funding for the roof repairs at the Pearce Institute were described as ‘timely’ in helping to maintain investment in the Pearce Institute and helping to stabilise the fortunes of the Shopping Centre.

6.37 The case study contacts accept the usefulness of the Theory of Change approach and have used this to prepare a more robust monitoring and evaluation framework based on clearer project specific measures but the business turnover and events measures still need to be clarified.

6.38 Attribution will be a challenge as the TCRF is funding only one third of the total cost of the four projects.

6.39 As far as the Govan Cross contacts are concerned the main issues arising in the TCRF project have been:

- TCRF has been a real catalyst in progressing priority projects like roof repairs to the Pearce Institute and public realm improvements. In some cases, TCRF has allowed the projects to be progressed more quickly or more extensive areas of public realm to be treated;

- The variable experience of working with and the performance of the four different contractors;

- Implementation of the projects on site has lead to a more positive perception (See Table 6.13) of the Pearce Institute (improved quality of internal spaces) and the wider Govan Cross area. There have been improvements in confidence and this has given CGAP the opportunity to consider promoting a Business Improvement District.

Case Study Interview Details

Main Contact Name	Susan Hanlin
Position	Executive Officer
Organisation	Central Govan Action Plan and Govan Cross Townscape Heritage Initiative
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Other Contacts	
Name	Fiona Burns
Organisation	Glasgow City Council
Name	Anne McChlery
Position	Glasgow Building Preservation Trust
Name	David Herring
Position	Project Consultant: Rockspring Hanover Property Unit Trust (owners Govan Shopping Centre)

7 BARRHEAD

Context and Background

7.1 Barrhead is located in the north of East Renfrewshire, approximately eight miles southwest of Glasgow. The town has good transport linkages to and from Glasgow and beyond, and retained a population of around 18,000 in 2008, making it the largest town within the local authority area.

7.2 The local economy has suffered from the effects of a decline in employment as a result of a downturn in local industry, including the loss of a number of large employers. This has led to various social, economic and employment challenges within Barrhead and levels of deprivation in the town are notably higher than across the rest of the local authority area.

7.3 The town centre itself is recognised as an area for priority action amongst local policy makers and as such is subject to a range of major regeneration proposals aimed at transforming the town. These include the development of new housing in and around the town centre, the provision of modern business space, a new health centre, and a new Community College. These plans form part of a £100m, ten-year plan to regenerate the town.

7.4 Within this wider context, the Barrhead TCRF project proposes a range of interventions aimed at progressing the town's regeneration. There were originally seven specific projects proposed namely:

- Internal refurbishment of Barrhead Sports Centre;
- Improvements to the façade and car park of the Main Street Shopping Centre;
- Comprehensive modernisation of Council owned shop fronts at 206-228 Main Street;
- Public realm improvements to complement the new Heath and Social Care Centre;
- Revamping of the vacant upper floor of the Westbourne Centre;
- Public realm improvements in Cross Arthurlie Street; and
- Acquisition and demolition of 55-59 Cross Arthurlie Street to facilitate new mixed residential development.

7.5 The total cost associated with these investments was circa £3.3m, £2.2m of which was requested from the TCRF. The remaining project funding comes from a range of other sources including East Renfrewshire Council, the NHS, and Sportscotland.

Population

7.6 Table 7.1 shows that Barrhead was home to approximately 17,900 people in 2009. This represents a decrease of 2% since 2001. The East Renfrewshire population remained stable over this period and the wider Scottish population increased by 3%.

7.7 61% of the Barrhead population are of working age. This is higher than in East Renfrewshire (59%) and lower than the national average of 63%.

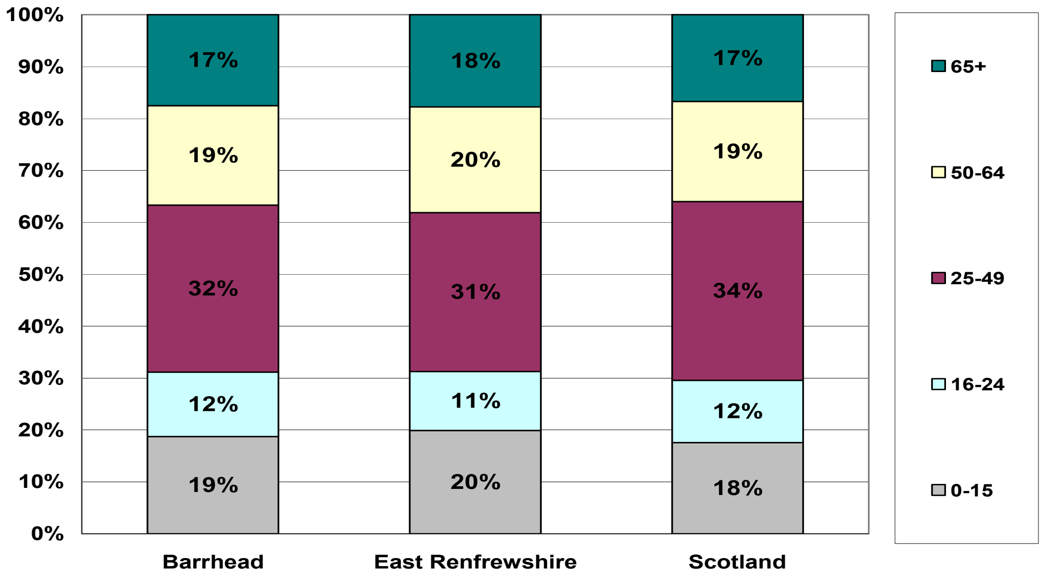
Table 7.1: Population

	Barrhead	East Renfrewshire	Scotland
Total Population 2009	17,900	89,200	5,194,000
Population Change 2001-09	-2%	0%	3%
% Working Age 2009	61%	59%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

7.8 Table 7.2 shows that the age structure of the East Renfrewshire population has lower proportions of 16-24 and 25-49 age groups and higher proportions of 0-15, 50-64 and 65+ age groups than the national averages. Compared with East Renfrewshire, the Barrhead population is similar across all age groups, identified by a difference of only 1% higher or lower.

Table 7.2: Age Profile of the Population 2009
(Source: ONS Mid-Year Population Estimates 2009)



Labour Market

7.9 Table 7.3 shows the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in East Renfrewshire closely accord with the national average.

7.10 Using the benefit claimant rate as a proxy for labour market participation, labour market participation levels in Barrhead are significantly lower than in East Renfrewshire and lower than the national average.

7.11 In January 2010, 4.9% of all working age residents in the Barrhead area were claiming the benefit, significantly higher than the average of 2.7% for East Renfrewshire but generally in line with the equivalent rate in Scotland.

7.12 Relative to the Scotland, the East Renfrewshire workforce is better qualified. 47% of the East Renfrewshire working age population are educated to degree level, higher than across Scotland as a whole (34%). A lower proportion of the East Renfrewshire working population have no qualifications at all – 10%, compared to 13% for Scotland.

Table 7.3: Labour Market

	Barrhead	East Renfrewshire	Scotland
Labour Market Participation			
Employment Rate	N/A	73%	72%
Unemployment Rate	N/A	6%	7%
Economic Inactivity Rate	N/A	23%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	19.1%	9.4%	14.6%
Jobseekers Allowance Claimant Rate	4.9%	2.7%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	47%	34%
% WAP with No Qualifications	N/A	10%	13%

7.13 Table 7.4 shows that there were approximately 5,000 jobs in Barrhead in 2008, representing a decrease of 3% since 2004. This was in contrast to the increases across East Renfrewshire and Scotland as a whole (5% and 3% respectively). Sixteen per cent of employee jobs in Barrhead are based within the financial & business services sector. This is higher than the East Renfrewshire average (13%) but lower than the national average (19%).

7.14 There were 400 business located in the town in 2008 which was a significant decrease (-10%) from 2004. This contrasts sharply with a 6% increase in East Renfrewshire and an 8% increase in Scotland over the same period.

7.15 When compared with the East Renfrewshire and national averages, Barrhead (two businesses per 100) has a lower business density rate than East Renfrewshire (3) and the Scotland average (4).

Table 7.4: Local Economy

	Barrhead	East Renfrewshire	Scotland
Employment			
Number of Jobs 2008	5,000	18,200	2,420,400
% Change 2004-08	-3%	5%	3%
% Jobs financial & business services	16%	13%	19%
Business Base			
Number of Businesses (2008)	400	2,400	181,500
% Change 2004-08	-10%	6%	8%
Businesses per 100 Head of Population	2	3	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

7.16 Table 7.5 shows a breakdown of all jobs by industry in Barrhead, East Renfrewshire and Scotland. The public sector is by far the largest employer in Barrhead and accounts for a larger share compared with East Renfrewshire and Scotland. Construction in Barrhead accounts for some 14% of employment, higher than the equivalent rates for East Renfrewshire and Scotland – 9% and 6% respectively.

7.17 The percentage of manufacturing activity in Barrhead at 3% is lower than the East Renfrewshire average of 5% and the national level of 9%.

Table 7.5: Employment

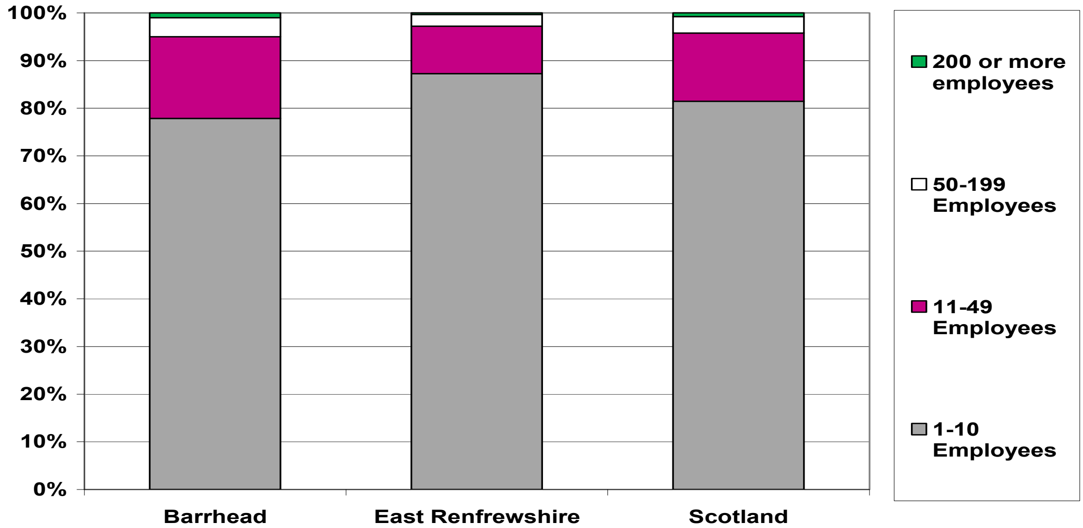
	Barrhead	East Renfrewshire	Scotland
Total Number of Jobs 2008	5,000	18,200	2,420,400
% Agriculture & Energy	0%	0%	3%
% Manufacturing	3%	5%	9%
% Construction	14%	9%	6%
% Retail & Catering	18%	26%	22%
% Transport & Communications	4%	3%	5%
% Financial & Business Services	16%	13%	19%
% Public Sector	41%	35%	30%
% Other Services	4%	9%	5%
Source: Annual Business Inquiry (ABI)			

Business Base

7.18 Figure 7.6 shows the profile of the business base in terms of sizeband in the local area, relative to East Renfrewshire and national data. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Barrhead, these employers account for a slightly lower share of employment (78%), when compared with East Renfrewshire (87%) and Scotland (81%).

7.19 On the other hand, businesses in Barrhead with between 11 and 49 employees account for around 17% of all businesses in the area – higher than the East Renfrewshire and national averages at 10% and 14% respectively. In 2008, 4% of businesses in Barrhead employed between 50 and 199 employees, higher than the averages for East Renfrewshire (2%) and Scotland (3%). In Barrhead, just 1% of all businesses employ more than 200 staff and this is similar to the Scottish rate.

Table 7.6: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))



Tourism

7.20 This section provides an overview of the Barrhead tourist market, providing some assessment of the recent performance at an East Renfrewshire and national level. Unfortunately it is not possible to use the data zone definition to look at the tourism market in Barrhead as the numbers involved are too small to be disclosed. Therefore this section uses data for the five 2003 CAS wards. (See Appendix)

7.21 Table 7.7 shows that the local area's tourism sector employed around 400 people in 2008, representing a dramatic downturn of 29% since 2004. This significant decline compares with an increase across East Renfrewshire (13%) and Scotland (5%). There were around 40 tourism businesses/workplaces in the local area in 2008 – a decrease of around 4% since 2004. This decline contrasts with an increase of 4% in both the East Renfrewshire and national average.

Table 7.7: Tourism

Tourism Employment & Workplaces	Barrhead	East Renfrewshire	Scotland
Employees (2008)	400	2,200	215,000
Change in Employees 2004-2008	-29%	13%	5%
Workplaces	40	200	19,500
Change in Workplaces 2004-2008	-4%	4%	4%
Source: Annual Business Inquiry (ABI)			

Baseline Measures

Table 7.8: Barrhead Town Centre: Baseline Measures

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	List indicating value of new development, expansions and improvements in the 12 months to Dec 2009 Gross town centre retail floor space: **4,112 sq m**	ERC Regeneration Retail Capacity Assessment (2005)	See Table 7.9 Previous RCA was commissioned to assess potential to grow Barrhead town centre and to inform policy. No current plans to repeat this.
No of Businesses	Independent retailers: **65** Franchise retailers: **10** *Industrial/commercial businesses in the town centre:* ***7*** Number of complimentary/leisure businesses: **30** Number of other businesses (e.g. Lawyers, Banks, Real Estate): **28** Number of industrial/commercial businesses in Industrial area north of Barrhead: **20**	Town Centre Health Check (March 2008 Survey) by Hall Aitken. Available from ERC Regeneration.	The next survey will be March 2011, and every 2 years after.

Measure	Specific Data	Source	Comment
No of jobs	**4,451**	IDBR Data	ERC Economic Development
Retail performance			
Rental levels/yields	No information on rental yields to date.	Likely to be undertaken by ERC	ERC will investigate the most cost effective way of collecting this in the future.
Vacancy levels	**4.4%** of retail ground floor units vacant	Town Centre Health Check (March 2008 Survey) by Hall Aitken. Available from ERC Regeneration.	The next survey will be March 2011, and every 2 years after.
Range of shops/ services	Number of independent retailers: **65** Number of franchise retailers: **10**	Town Centre Health Check (March 2008 Survey) by Hall Aitken. Available from ERC Regeneration.	The next survey will be March 2011, and every 2 years after.
Other; Retail Ranking	Retail ranking 2008 **1123** out of 1256	Experian Retail Rankings 2007, via Town Centre Health Check	The next survey will be March 2011, and every 2 years after.
Other: Retail Turnover	Convenience retail turnover: **£17.64 million**	Retail Capacity Assessment (2005) , via Town Centre Health Check	The next survey will be March 2011, and every 2 years after.
Use and Accessibility			
Parking	Parking spaces**: 410 public** & 416 tied to retail/train station; Disabled spaces: 33; Dedicated cycle parking areas: 2.	DTZ Regeneration Framework Survey (2005), via Town Centre Health Check	The next survey will be March 2011, and every 2 years after.
Pedestrian Flow	Weekend Flow: 3 locations; 30 mins two times a day Midweek Flow: 3 locations; 30 mins two times a day (different times from weekend)	Town Centre Health Check (March 2008 Survey) by Hall Aitken. Available from ERC Regeneration.	Annual surveys planned. (Same locations, same week number, same times during the day.)
Other: Main Street Crossings	Crossings where pedestrians are granted right of way: 2	Town Centre Health Check (March 2008 Survey) by Hall Aitken. Available from ERC Regeneration.	The next survey will be March 2011, and every 2 years after.

Measure	Specific Data	Source	Comment
Other: Disabled Access	% of retail/leisure units with level access: 60%	Town Centre Health Check (March 2008 Survey) by Hall Aitken. Available from ERC Regeneration.	The next survey will be March 2011, and every 2 years after.
Other: Rail Usage	Number of passenger entries and exits in 2005/6: 511,073	Office for Rail Regulation (2006), via Town Centre Health Check	Usage data will be collected to feed into next Town Centre Health Check in March 2011.
Safety			
Other: Crime Rates Shoplifting	Shoplifting offences in the 6 months up to end of September 2007: 30 ('down from 52')	Strathclyde Police, via Town Centre Health Check	Collected biannually (to feed into next Town Centre Health Check in March 2011.)
Other: Crime Rates	Reported incidents per household: Auchenback: 0.39; Arthurlie: 0.12; Dunterlie: 0.29; Neilston: 1.12	Strathclyde Police, via Town Centre Health Check	Collected biannually (to feed into next Town Centre Health Check in March 2011.)
Other: CCTV cameras	CCTV cameras providing public coverage: 6	Town Centre Health Check (March 2008 Survey) by Hall Aitken. Available from ERC Regeneration.	The next survey will be March 2011, and every 2 years after.

Linkages & Catalyst for New Investment

7.22 The public realm improvements at Cross Arthurlie Street have acted as a catalyst for other investment in shop fronts. It is anticipated the development of some of the gap sites in the town centre will be accelerated.

7.23 Tim Vaughan of Moorgarth Properties, owners of the Westbourne Business Centre confirmed that TCRF funding had played a pivotal role in the refurbishment of the building. Moorgarth Properties purchased the site in 2004. Towards the end of the Council lease, Moorgarth considered two options: redecoration or a more comprehensive redevelopment of the site. The latter was the desirable option as there were no modern start-up units available to rent in the Barrhead area, but full-scale refurbishment was not financially feasible as the rental income would have been low. Most of the feasibility work had already been done which confirmed that that the redevelopment option was not financially viable, and therefore the project met the terms of the grant application.

7.24 Tim Vaughan confirmed that the refurbishment would not have been possible without TCRF funding. One of the conditions of the funding was to provide a lift at a cost of £35,000 to ensure the building was fully DDA compliant. This increased the capital cost from a budget of £120,000 to over £150,000 and the first tranche of monies has been received. Four tenants are now in place since the centre opened in early April 2010. Ultimately the success of the investment is dependent on the level of uptake of the units.

Project Specific Measures

7.25 A town centre health check commissioned by East Renfrewshire Council was undertaken for Barrhead by Hall Aitken in March 2008. The health check has provided the majority of the baseline data in Table 7.8 above. Subsequent health checks were not carried out in 2009 & 2010, however there is the intention to do so in 2011.

7.26 The Project performance indicators and the various sources are summarised in Table 7.9 below.

Table 7.9: Barrhead Main Street Shops: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
To upgrade the shop fronts including canopy, new lighting, new fascia, signage, paint and retiling. To increase localised demand for services by creating a more pleasant and accessible environment. To increase footfall to provide opportunities for economic growth and expansion to form existing and new businesses, bringing employment opportunities into the area.	Number of shop units modernised.	TCRF Data
	Vitality indicators: - Ground floor vacancy rate - Number of industrial/ commercial businesses Viability indicators: - Town centre floor space – gross - Level of convenience retail turnover - Independent and franchise retailers - Complementary/leisure businesses Increased footfall	Town Centre Health Check (Hall Aitken consultants)
	Relative retail offer Vitality index	Experian Retail Rankings 2007

Table 7.10: Barrhead Main Street Public Realm: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
To provide road, footway, lighting and landscaping improvements To increase localised demand for services by creating a more pleasant and accessible environment. To increase footfall to provide opportunities for economic growth and expansion from existing and new businesses, bringing employment opportunities into the area.	Road surface and footway upgrade areas (sq m)	TCRF Contract
	Accessibility indicators: Main Street crossings where pedestrians are granted right of way - Dedicated cycling parking provision - Disabled access: % of retail/leisure units with level access Increased footfall	Town Centre Health Check (Hall Aitken consultants)

Table 7.11: Barrhead Main Street Shopping Centre: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
To improve the shopping centre façade and car park To increase localised demand for services by creating a more pleasant and accessible environment. To increase footfall to provide opportunities for economic growth and expansion from existing and new businesses, bringing employment opportunities into the area.	- Re-cladding of façade - Renovation of existing car park - Renovation of interior to create additional retail and office floor space (all sq m)	TCRF Contract
	Vitality indicators: - Ground floor vacancy rate - Number of industrial/commercial businesses Viability indicators: - Independent and franchise retailers - Complementary/leisure businesses - Footfall	Town Centre Health Check (Hall Aitken consultants)
	Viability indicators: - Town centre gross floor space - Level of convenience retail turnover	Retail Capacity Assessment (undertaken on a two yearly basis; last one was 2010)
	Accessibility indicators: - Car parking spaces - Disabled parking spaces	Undertaken in 2005 by DTZ

Notes
Indicators that ERC need to measure in the future are indicated in *italics.*

Table 7.12: Westbourne Centre: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
To provide flexible office space within refurbished building To satisfy unmet demand for such facilities	Monitoring undertaken at a strategic level as part of SOA performance indicators: - Area refurbished & available (sq m) - Take up of office space - Quarterly register of activity provided by Moorgarth Ltd	TCRF Data
	Number of industrial/commercial businesses	Town Centre Health Check (Hall Aitken consultants)

Table 7.13: Cross Arthurlie Street Public Realm and 55-59 Cross Arthurlie Street: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
To increase access to and localised demand for services thus promoting economic and employment growth which will benefit both businesses and the wider community To recreate a sustainable mixed residential and retail centre and create construction jobs	Upgrade of road surface and footways and installation of street furniture, trees and lighting. Area upgraded (sq m) Acquisition and demolition of vacant building and promotion of site for mixed use development	TCRF Data
	Vitality indicators: - Ground floor vacancy rate - Number of industrial/commercial businesses Viability indicators: - Independent and franchise retailers - Complementary/leisure businesses - Increased footfall	Town Centre Health Check (Hall Aitken consultants)
	Viability indicators: - Town centre gross floor space - Level of convenience retail turnover	Retail Capacity Assessment (undertaken on a two yearly basis; last one was 2010)
	Relative retail offer Vitality index	Experian Retail Rankings 2007

Notes: Key performance indicators have been developed and included in both the Single Outcome Agreement (SOA) and Operational Development Plan. These indicators have also been used to monitor the performance of the regeneration proposals and components.

Addressing Theory of Change

7.27 The table below summarises the review of outputs and outcomes using the emerging Theory of Change (public realm, accessibility & townscape and business, commercial and retail space models).

Table 7.14: Barrhead Main Street Shops: Project Specific Measures (Three Projects)

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
To upgrade the shop fronts including canopy, new lighting, new	Modern-isation of 12 shop front units Upgrade	Enhanced physical & visual appearance. As a result of	To increase localised demand for services by creating a more	Opportunities for economic growth and expansion from existing and new businesses,	Yes re number of shop fronts improved. Annual East Renfrewshire Citizens Panel (next due in May 2011) will

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
fascia, signage, paint and retiling.	100m of road surface and footway Re-clad 176 m of façade. Renovation of existing car park. Anticipated internal refurbishment of Shopping Centre may not happen	TCRF investment 2 shop front grants have been awarded (ERC Grant £1,107 & private investment £1,107). Has resulted in private investment of £35,673 levered in.	pleasant and accessible environment. To increase footfall to provide opportunities for economic growth	bringing employment opportunities into the area.	include a question relating to level of satisfaction about Barrhead town centre and neighbourhood regeneration. *No other qualitative or perception surveys programmed.*
Engagement of local businesses Well designed & maintained streets and public spaces (including parking) Training project to undertake part of work To provide road, footway, lighting and landscaping improvements To increase localised demand for services by creating a more pleasant and accessible environment. To increase footfall to provide	Increased spend on local contractor, supplies & initial jobs related to regeneration work (an outcome?) In-house training project for some of the external improvement work has resulted in 7-10 training places.	Sustained employment in local businesses Increased range, quality & competitiveness of local retail & businesses Increased income for local businesses Increased footfall & local spend Increased awareness, perceived value & use of local retail & businesses by residents and visitors Enhanced sense of safety/security Improved employability amongst local residents	Increased inward investment for retail (& other sectors) & sustained job opportunities Sustained use of local retail businesses Increased social interaction More satisfactory pride in local area Leverage of additional funds	Increased environmental sustainability & reduced pollution Increased community inclusion & cohesion & improved social capital Increased percentage of working age in employment	Only for some of the quantitative outcomes and not for any of the qualitative/perceived outcomes. Outcomes measured: - Initial jobs related to regeneration outcome - Range of local retail & businesses - Increased footfall - Increased spend (turnover)/income/use Percentage of working age in employment *Remainder of outcomes are not measured in the sources identified in Table 7.9 examples:* *- Spend on local contractor and supplies* *- Employment in local businesses* *- Quality & competitiveness of local retail & businesses* *- Awareness, perceived value of local retail & businesses*

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
opportunities for economic growth and expansion from existing and new businesses, bringing employment opportunities into the area					*- Sense of safety/security* *- Employability of local residents/ sustained job opportunities* *- Increased social interaction* *- Pride in local area* *- Environmental sustainability & reduced pollution* *- Community inclusion & cohesion & improved social capital*

Notes
Indicators that ERC need to measure in the future are indicated in *italics.*

Table 7.15: Westbourne Centre: Project Specific Measures

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
To provide flexible office space within refurbished building To satisfy unmet demand for such facilities	Refurbish 567 sq m of the upper floor of the building and create a flexible working space of up to 15 business units.	Has resulted in additional funds of £106,755 levered in.	Increased inward investment: new businesses attracted/started up & sustained job opportunities Sustained use of local retail businesses Leverage of additional funds	Opportunities for economic growth and expansion from existing and new businesses, bringing employment opportunities into the area	Yes: Number of business occupying space Number of jobs created

Table 7.16: Cross Arthurlie Street Public Realm and 55-59 Cross Arthurlie Street: Project Specific Measures

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
To provide road, footway, lighting and	Upgrade 524m of road surface and footways. Install street	As a result of TCRF investment 3 shop front grants have been	To increase localised demand for services by	To increase access to and localised	See Table 7.14 above

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes: 2015+	Measure In Place
landscaping improvements	furniture, trees and lighting. Has resulted in additional private investment of £235,000 levered in. Acquire and demolish vacant building and promote site for 1903 sq m site of mixed use development.	awarded (ERC Grant £9,800 & private investment £11,800); a further 2 are being negotiated (ERC Grant £7,000 & private investment £7,000)	creating a more pleasant and accessible environment. To increase footfall to provide opportunities for economic growth	demand for services thus promoting economic and employment growth which will benefit both businesses and the wider community To recreate a sustainable mixed residential and retail centre and create construction jobs	

Progress: Jan/Early Feb 2011

7.28 'Better Barrhead', as originally conceived, was a programme of seven projects within Barrhead town centre. These projects were not developed specifically for the TCRF submission; they had their roots in the DTZ Pieda Report "Better Barrhead Framework and Town Centre Master Plan" (2007); the Barrhead Regeneration Framework and Town Centre Master Plan (updated Feb 2008); and the Barrhead Town Centre Urban Design Framework. Therefore, significant project development work had already been made in taking the projects forward at the time of the TCRF application.

7.29 The original seven projects were reduced to six as the proposed internal modifications to Barrhead Sports Centre were not approved by the Scottish Government. The six component projects were:

- **Main Street Shops:** Comprehensive modernisation of Council owned shop fronts at 206-228 Main Street;
- **Main Street Public Realm:** Public realm improvements to complement the new Health and Social Care Centre;
- **Main Street Shopping Centre:** Improvements to the façade and car park of the Main Street Shopping Centre;

- **Westbourne Business Centre:** Revamping of the vacant upper floor to provide flexible office space;

- **Cross Arthurlie Street Public Realm:** Public realm improvements to create a sustainable retail centre;

- **Cross Arthurlie Street:** Acquisition and demolition of 55-59 Cross Arthurlie Street to facilitate new mixed residential development.

7.30 The TCRF capital allocation was £1.408m. By November 2010 the total TCRF spend was £1.247m.

7.31 The Main Street Shops Upgrade is complete.

7.32 The Main Street Public Realm contract was due to start on-site in the second week in June 2010 and be completed in mid September 2010. However this was delayed due to bad weather and utilities services issues and will now be completed in March 2011. The improvements will decrease the severance caused by the dual carriageway, create a more pedestrian friendly area and include on-street parking.

7.33 The Main Street Shopping Centre Upgrade had been delayed but is now completed and final invoices are awaited.

7.34 The Westbourne Business Centre was completed in early April 2010 and has levered in more private funding than initially anticipated. The office suites which range in size from 150 sq ft up to 4,000 sq ft are available on flexible leases from one month upwards. A total of four units have been leased with a further two under offer. A new web site to promote the units has been set up.

7.35 The public realm improvements at Cross Arthurlie Street are complete. The modernisation of the shop fronts at 206-228 Main Street including new canopies and shop signs has also been completed. The improvements to the Main Street Shopping Centre and car park were to be completed by the end of September.

7.36 The project at 55-59 Cross Arthurlie Street was underway in May 2010 when the former gym building was demolished. Joint marketing terms have now been agreed with the owner of the adjacent site and the wider site is being marketed by an independent agent and being actively promoted via ERC developers' forum. The aim of securing ground floor retail may need to be altered due to market conditions despite interest from a neighbourhood shopping operator.

Conclusions

7.37 The six TCRF projects were not developed specifically for the TCRF submission and they had their roots in a number of earlier strategy documents.

7.38 The establishment of a cross-departmental delivery group, which operated at a senior level within the Council, was particularly helpful in developing and delivering the projects in the tight timescale.

7.39 There is robust and consistent town centre data available through the Council including a 2008 Health Check that is being updated in March 2011.

7.40 In Cross Arthurlie Street in particular the completion of the TCRF project has led to a small group of business getting together to proactively explore proposals for joint marketing, shop front improvements and introducing a farmers' market. These kind of proactive business-led initiatives are also expected to progress in Main Street. In the longer term, East Renfrewshire Council intend to explore the possibilities of establishing a Business Improvement District based on this business interest.

7.41 The case study contact accepted the usefulness of the Theory of Change approach and has used this to prepare a more robust monitoring and evaluation framework based on clear project specific measures.

7.42 As far as the Barrhead contact is concerned the main issues arising in the TCRF project have been:

- Impressed by the private sector business response, particularly in Cross Arthurlie Street;
- Pleased with the 'light touch' reporting arrangement to Scottish Government;
- Disappointed that a more radical reconfiguration of the Shopping Centre was not possible.

Case Study Interview Details

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8 AIRDRIE

Context and Background

8.1 Airdrie is located within the local authority area of North Lanarkshire and forms a conurbation with neighbouring town Coatbridge. The town lies approximately 12 miles east of Glasgow city centre, and had a population of 36,400 in 2008 [12].

8.2 Airdrie grew in tandem with the development of the coal, engineering and manufacturing industries following the industrial revolution. The subsequent decline of these industries, however, has resulted in a number of economic, social and environmental changes, and a reorientation of the local economy towards much more service based activities.

8.3 Airdrie is one of seven main towns within the local authority area [13], although the North Lanarkshire Local Plan indicates that there is no single dominant focus for retail or town centre activities. This is perhaps reflected in the TCRF application, which targets one key development in each of the seven towns.

The TCRF Project

8.4 A key theme running through the planned TCRF project activities is the need to attract much greater numbers of people and expenditure back into the towns. The projects are seeking to achieve this primarily through investment in the physical renewal of existing retail, housing, and public space. In addition, a number of public realm and accessibility improvements, including the creation of new outdoor events space, improved pedestrian routes, and improved signage, lighting, and CCTV are also planned.

8.5 In Airdrie specifically, the TCRF project will see the development of a mixed use scheme on the site of a former department store, providing new retail space on the ground floor and housing units above. Total project funding costs amount to £3.2m, £400,000 of which is from the TCRF. The two other funders are the Scottish Government (Housing Association Grant funding) and Clyde Valley Housing Association, who are contributing £1.6m and £1.22m respectively.

Population

8.6 The population of Airdrie was 36,400 in 2009. The total population of the town has declined by 3% since 2001, compared to a 2% increase across North Lanarkshire over the period. Scotland has also seen an upward trend in population, growing by 3% since 2001.

8.7 The proportion of the Airdrie population that is of working age (62%) is broadly in line with the regional and national averages (both 63%).

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[12] Scottish Neighbourhood Statistics
[13] The others are Bellshill, Coatbridge, Cumbernauld, Kilsyth, Motherwell, and Wishaw.

Table 8.1: Population

	Airdrie	North Lanarkshire	Scotland
Total Population 2009	36,400	326,300	5,194,000
Population Change 2001-09	-3%	2%	3%
% Working Age 2009	62%	63%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

8.8 Figure 8.2 shows that the age structure of Airdrie is broadly similar to that of North Lanarkshire and Scotland as a whole. Some 34% of the Airdrie population are within the 'prime working age-group' of 25-49 year-olds – in line with Scotland, but slightly lower than North Lanarkshire. Relative to the national average, a slightly lower proportion (16%) of the town's population is aged 65 or over.

Figure 8.2: Age Profile of the Population 2008
(Source: ONS Mid-Year Population Estimates 2008)

Labour Market

8.9 Table 8.3 shows the 2010 labour market participation levels and that the regional area is characterised by a lower level of economic inactivity and slightly higher level of unemployment relative to Scotland.

8.10 Using the benefit claimant rate as a proxy for labour market participation, it can be assumed that labour market participation levels are lower than across North Lanarkshire and Scotland as a whole.

8.11 In January 2010, 6.3% of all working age residents in Airdrie were claiming the benefit, higher than the equivalent rates of 5.7% for North Lanarkshire and 4.2% for Scotland.

8.12 Relative to Scotland, North Lanarkshire's workforce is less well qualified. Just 29% of the region's working age population are educated to degree level, considerably lower than across Scotland as a whole (34%). Furthermore, a much greater proportion of North Lanarkshire's working population have no qualifications at all – 19%, compared to 13% for Scotland.

Table 8.3: Labour Market

	Airdrie	North Lanarkshire	Scotland
Labour Market Participation			
Employment Rate	N/A	72%	72%
Unemployment Rate	N/A	8%	7%
Economic Inactivity Rate	N/A	21%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	20.0%	18.8%	14.6%
Jobseekers Allowance Claimant Rate	6.3%	5.7%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	29%	34%
% WAP with No Qualifications	N/A	19%	13%

Local Economy

8.13 Table 8.4 shows that there were 14,900 employee jobs in Airdrie in 2008, representing a decline of 1% since 2004. This compares to growth of 5% across the region as a whole and 3% across Scotland. The headline decline in jobs of 1% across Airdrie masks sectoral changes that have occurred between 2004 - 2008. Key in this respect have been declining employment levels within manufacturing and retail & catering, which between them witnessed a net loss of around 1,900 jobs. In contrast, the public sector saw an increase of 1,700 jobs, largely offsetting these losses.

8.14 Nearly one-fifth of all employee jobs in Airdrie are based within the financial & business services sector. This is in line with the national average, and above the North Lanarkshire average of 15%.

8.15 There were 1,000 businesses within Airdrie in 2008 – a small growth of 1% since 2004. However, this rate of growth was much slower than the regional and national averages of 7% and 8% respectively.

8.16 Business density levels in Airdrie are in line with the North Lanarkshire average of three businesses per 100 of the population. However, both Airdrie and North Lanarkshire have lower business density rates than Scotland as a whole (four per 100 of population).

Table 8.4: Local Economy

	Airdrie	North Lanarkshire	Scotland
Employment			
Number of Jobs 2008	14,900	125,400	2,420,400
% Change 2004-08	-1%	5%	3%
% Jobs financial & business services	19%	15%	19%
Business Base			
Number of Businesses (2008)	1,000	9,200	181,500
% Change 2004-08	1%	7%	8%
Businesses per 100 Head of Population	3	3	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

8.17 Table 8.5 shows a breakdown of all jobs by industry in Airdrie, North Lanarkshire and Scotland. The public sector is by far the largest employer in Airdrie, accounting for almost half of employment in the town in 2008 (around 7,300 jobs). Some 5,000 of these are located within the hospital sector – the vast majority of which are likely to be at the Monklands district general hospital.

8.18 The dominance of the public sector in Airdrie means that the town is under-represented in other sectors relative to the regional and national averages, most notably manufacturing (just 2% of all jobs), but also within the retail & catering and transport sectors. While manufacturing employment continues to decline nationally, the proportion of all jobs within the sector both nationally (9%) and regionally (12%) remains some way above the position in Airdrie.

Table 8.5: Employment

	Airdrie	North Lanarkshire	Scotland
Total Number of Jobs 2008	14,900	125,400	2,420,400
% Agriculture & Energy	0%	2%	3%
% Manufacturing	2%	12%	9%
% Construction	8%	8%	6%
% Retail & Catering	17%	23%	22%
% Transport & Communications	2%	7%	5%
% Financial & Business Services	19%	15%	19%
% Public Sector	49%	29%	30%
% Other Services	3%	4%	5%
Source: Annual Business Inquiry (ABI)			

8.19 The Annual Business Inquiry reveals that just under half (49%) of all employee jobs in Airdrie were full-time in 2008. This is well below the regional and national averages where around 68% of all jobs are undertaken on a full-time basis.

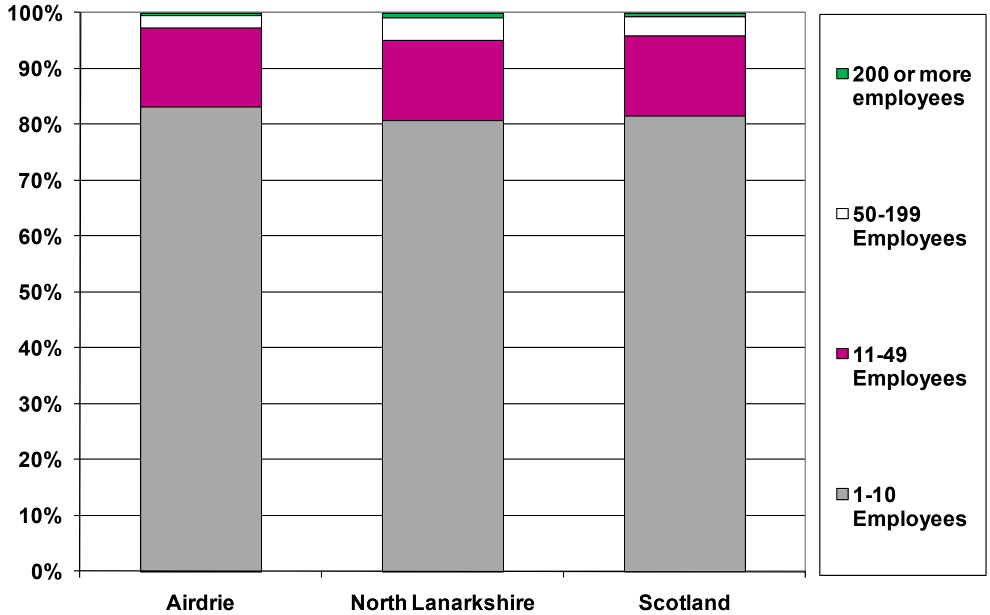
Business Base

8.20 Figure 8.6 shows the profile of the business base in terms of sizeband in Airdrie, North Lanarkshire and Scotland. It shows the vast majority of businesses across each of the three areas have between 1-10 employees. In Airdrie, these employers account for a slightly larger share of employment (83%), relative to the regional (81%) and national (81%) equivalents.

8.21 The proportion of businesses that have 11-49 employees is the same across each of the three comparator areas (14%).

8.22 Relative to the regional and national averages, Airdrie has a lower share of businesses with 50-199 employees with just 2% of businesses falling into this category in 2008. This was lower than in North Lanarkshire (4%) and Scotland (3%). Just 1% of all businesses in Airdrie, North Lanarkshire, and Scotland have more than 200 employees.

Figure 8.6: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI)



Tourism

8.23 This section provides an overview of Airdrie's tourist market, providing some assessment of the recent performance at a regional and national level. Table 8.7 shows that the local area's tourism sector employed around 900 people in 2008, representing growth of 10% since 2004. This rate of growth was slightly slower than across North Lanarkshire (11%) but faster than Scotland as a whole.

8.24 There were 100 tourism businesses in the local area in 2008 – a slight decrease (1%) since 2004. This decline is in contrast to regional and national growth averages of 4% over the same period.

Table 8.7 Tourism

Tourism Employment & Workplaces	Airdrie	North Lanarkshire	Scotland
Employees (2008)	900	8,500	215,000
Change in Employees 2004-2008	10%	11%	5%
Workplaces	100	800	19,500
Change in Workplaces 2004-2008	-1%	4%	4%
Source: Annual Business Inquiry (ABI)			

Strategic Challenges & Drivers

8.25 The overall project aims to improve the economic performance of the seven towns in the local authority area. A recent review of town centres within North Lanarkshire concluded that there was significant need to generate increased footfall in town centres through investment in both 'place' and 'diversification'. The TCRF project investments support these broad aims and are being carried forward under the two key themes of 'Diversification through Development' and 'Safe and Attractive'. The former of these primarily involves the acquisition of existing "eyesore" buildings for regeneration into a range of mixed uses, while the latter focuses on making the town centres safer, more sustainable and more attractive to visit.

Linkages and Catalyst for New Investment

8.26 The Airdrie TCRF project is taking place within the context of a much wider, strategic package of investments across North Lanarkshire as a whole and Airdrie in particular.

8.27 Recent investments in the town include the Airdrie Business Centre, developed around three years ago on a previously contaminated site on the periphery of the town centre. The business centre provides a stock of modern office property for small businesses. In addition, the Wellwynd Church in the town centre is being converted into a social enterprise centre.

8.28 It is anticipated that implementation of the TCRF project will have a catalytic effect in leveraging investment from the various local partners and sectors. The regeneration of currently vacant buildings into new retail uses will not only reduce the number of vacant shops within the town centres, but is expected to generate new employment opportunities and strengthen the retail offer within the towns. New housing to be constructed is expected to support town centre sustainability and expenditure levels, while bringing redundant buildings back into meaningful use and improve town centre amenity.

Town Centre

8.29 Table 8.8 shows the extent to which baseline data on town centre performance was available at the time of the last study visit. North Lanarkshire Council's Strategic Planning team has recently established a corporate approach to the measurement of town centre performance which is in the early stages of delivery. This is expected to be rolled out over the remainder of 2011 to cover a range of other indicators and other towns.

Table 8.8: Town Centre Baseline Measures (Jan 2010 or Proxy)

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	Not collected proactively, however, planning applications and building warrants are available.		
No of Businesses	1,050	Annual Business Inquiry (2008)	
No of jobs	14,900	Annual Business Inquiry (2008)	
Retail Performance			
Rental levels	Not available		
Vacancy levels	7.2% of retail units	North Lanarkshire Council	
Range of shops/ services	Retail units: 168 (30,429 sq m) Commercial / office units : 91 (18,239 sq m) Leisure units 64 (13,085 sq m)	North Lanarkshire Council	
Economic Activity			
Recent Investment	Not collected proactively, however, planning applications and building warrants are available.		

Project Specific Measures

Table 8.9: Airdrie: Project Specific Measures

Activities	Outputs	Short Term Outcomes	Interim Outcomes	Longer Term Outcomes
The project involves acquisition and redevelopment of a vacant department store building to include new housing, retail and public services hub	Building developed for needs of local communities and business (1)	Creation of additional training places on construction work		Stronger Economy
	Purchase of 2,015 sq m of retail space and re-use	Sustaining local construction jobs	Sustained use of local retail, leisure & cultural facilities	Places where people want to live and work & which enhance their quality of life
	Creation of 31 new homes	Creation of new retail employment	Increased footfall & local spend	

Activities	Outputs	Short Term Outcomes	Interim Outcomes	Longer Term Outcomes
	Additional 60 people living in town centre	Increased number and mix of residents	More robust & adaptable & fit for purpose TC	
	Sensitive re-use of derelict building		Safer town centres	
			Improved image for town centre	

8.30 Table 8.9 shows the project specific measures agreed for the project between the research team and the project manager. Given the lack of progress with the project, developing an approach to capturing these measures had unsurprisingly not been seen as a priority by the project manager. The case study visit was seen to help clarify potential short term outputs from the project, particularly in terms of quantification.

8.31 If the project progresses it is expected that data would be gathered for the project through an ex-post evaluation and the planned North Lanarkshire Town Centre Monitoring programme.

Progress: Jan/Early Feb 2011

8.32 At the time of the case study visit in January 2011, no progress had been made with the Airdrie element of the project. This was in contrast to the other elements of the North Lanarkshire TCRF application, all of which had progressed.

8.33 After some initial delays, the beginning of demolition work in the department store was scheduled to take place in the summer of 2010. Preparatory work involved the erection of scaffolding to the rear of the building, which in turn required access to a piece of land owned by a public house/brewery company.

8.34 The land owned by the brewery company was used as a smoking area for pub users. The brewery company requested that the start of work was deferred in the summer of 2010 and cited fears that the loss of the smoking area would adversely affect trade during the 2010 football World Cup.

8.35 A number of other sporting events were then cited by the brewing company through the autumn of 2010 as reasons why permission to access the site was withheld. Since that time the brewery company has made informal objections to the development proposal as a whole. The company has cited wider concerns about the impact of residential development being located so close to a public house.

8.36 At the time of the site visit, these issues had still not been resolved and permission to access the rear of the department store had not been given. As a result no demolition or building work had been commenced on the site at the time of the second visit in early February 2011.

Conclusions

- The project was conceived as part of a wider set of projects that are expected to contribute to the long term regeneration of Airdrie;

- The lack of progress with the project created obvious problems in terms of identifying lessons for successful regeneration;

- However, this delay has created an opportunity for a revision of the measures that will be used to describe the expected outputs and outcomes from the project;

- There has been a significant investment of time and resource by North Lanarkshire Council in the period since 2009 to understand more consistently the performance of all North Lanarkshire Town Centres.

Case Study Interview Details

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9 MILLPORT

Context and Background

9.1 Millport is a town based on the Isle of Cumbrae, located just off the coast of North Ayrshire. An approximate ten minute journey by ferry from Largs, the population of the island (Millport is the only town) was 1,400 in 2008 [14].

9.2 The main industries on the Isle of Cumbrae are tourism and agriculture. The island was a very popular tourist destination in the 1950s and 1960s, attracting many visitors from the Scottish mainland, particularly the west coast. However, more recently the number of tourists coming to stay has fallen steadily and most visitors to the island these days are day-trippers. This reduced popularity has led to a resultant downturn in the island's economy in recent years.

9.3 The strategy of the emerging North Ayrshire Local Development Plan proposes that future development within the area's towns should take place within a hierarchical structure, reflecting the scale and character of the towns. Millport's small scale, historical character [15] and the fact that it is located on an island mean that future development activity in the town is likely to be relatively limited, orientated towards community development needs and services for the local catchment area.

The TCRF Project

9.4 The Millport TCRF project emerged in response to an identified need within local planning and economic development policy to promote opportunities for the growth of small and indigenous businesses, and to promote culture and arts in Millport town centre. The project also sought to arrest declining tourist numbers in the area and target business and day-trip leisure tourism markets.

- The project represents the second phase of works building on the recently successful restoration of Garrison House in Millport.
- Key work to be undertaken involves the remodelling of the Garrison House Lodge House by February 2010 to provide the community with a Business Centre.
- Two derelict outbuildings will also be converted into community arts and culture space and a retractable courtyard cover will be constructed.
- The project is the first in a series of early actions in the emerging Isle of Cumbrae Development Plan.

9.5 The overall objectives of the project are to make the town a more appealing place to do business and to increase the attractiveness of the town as a location for tourism.

9.6 There are a number of social, economic and environmental drivers underpinning the project:

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[14] Scottish Neighbourhood Statistics
[15] The town is classified in the Local Plan as an outstanding conservation area.

- **Economic** – to improve Millport Town Centre by providing improved business and tourism facilities with the aim of making the town centre an attractive place to do business and attract increased footfall. The renovation of the Lodge House will bring the building back into use in the business community while assisting in the regeneration of the town centre;

- **Social** – the new business centre will increase networking opportunities for the business community, while the remodelling of the Garrison outbuildings will provide a high quality cultural and artistic space;

- **Environmental** – remodelling of the outbuildings and lodge house will bring currently inactive and derelict buildings back into use and will complement the refurbished main Garrison House.

Population

9.7 Table 9.1 reveals that Millport was home to approximately 1,400 people in 2009. This represents a decline of around 3% since 2001. North Ayrshire's population remained unchanged over this period but the wider Scottish population increased by 3%, in contrast to the downward trend in Millport.

9.8 Forty-nine per cent of Millport's population are of working age. This is lower than both the regional and national averages of 60% and 63% respectively.

Table 9.1: Population

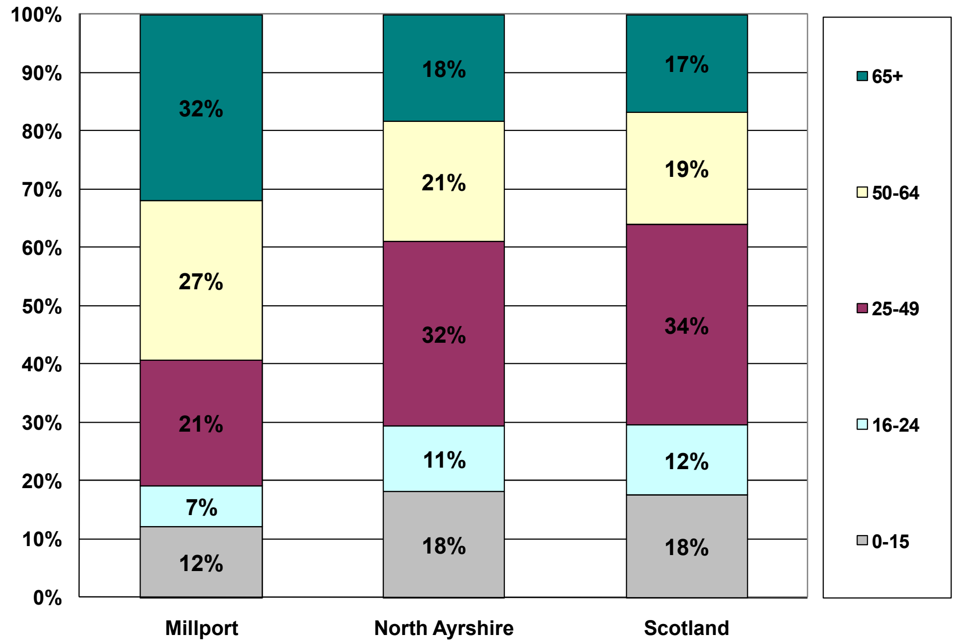
	Millport	North Ayrshire	Scotland
Total Population 2009	1,400	135,500	5,194,000
Population Change 2001-09	-3%	0%	3%
% Working Age 2009	49%	60%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

9.9 Figure 9.2 shows that the age structure of North Ayrshire's population is broadly similar to that of Scotland. Compared with the regional and national averages, Millport's population is characterized by lower shares of residents who are under the age of 16, youths between the ages of 16 and 24 and those of 'prime' working age (25-49).

9.10 The analysis also reveals that older people over the age of 50 account for a greater share of Millport's population. More than a quarter of the local population are between the ages of 50 and 64, compared with 21% for North Ayrshire and 19% for Scotland. Thirty-two per cent of Millport's population is over the age of 65 – this is considerably higher than both North Ayrshire (18%) and Scotland (17%).

Figure 9.2: Age Profile of the Population 2007
(Source: ONS Mid-Year Population Estimates *2008)*



Labour Market

9.11 Table 9.3 shows the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in the regional area are generally below the national average.

9.12 Using the benefit claimant rate as a proxy for labour market participation, it can be assumed that labour market participation levels are higher than across North Ayrshire as a whole, but below the national average.

9.13 In January 2010, 4% of all working age residents in the Millport area were claiming the benefit, in line with the equivalent rate for Scotland but lower than that of North Ayrshire (6%).

9.14 Relative to Scotland, North Ayrshire's workforce is less well qualified. Twenty-six per cent of the region's working age population are educated to degree level, considerably lower than across Scotland as a whole (34%). Furthermore, a slightly greater proportion of North Ayrshire's working population have no qualifications at all – 14%, compared to 13% for Scotland.

Table 9.3: Labour Market

	Millport	North Ayrshire	Scotland
Labour Market Participation			
Employment Rate	N/A	65%	72%
Unemployment Rate	N/A	12%	7%

Economic Inactivity Rate	N/A	27%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	16.2%	19.5%	14.6%
Jobseekers Allowance Claimant Rate	4.3%	6.6%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	26%	34%
% WAP with No Qualifications	N/A	14%	13%

Local Economy

9.15 Table 9.4 shows that there were approximately 330 jobs in Millport in 2008, representing a decline of 9% since 2004. This was faster than the rate of decline across the region as whole (2%) and in contrast to growth of 3% across Scotland as a whole. The decline in the local area has largely been driven by decreases in employment in the public administration, education and health sector.

9.16 Only 5% of employee jobs in Millport are based within the financial and business services sector. This is below both the regional and national averages, where this sector accounts for 8% and 18% respectively.

9.17 There were 80 business located in the local area (town/town centre or ward) in 2007 which was 3% higher than in 2004. This was a slower rate of growth than that experienced across both the region (7%) and the nation (8%) over the same period.

9.18 However, when compared with the regional and national averages, Millport has a higher business density rate. In 2008, there were five businesses per 100 of the population in Millport. This was above the regional average of three as well as the Scottish average of four. It is possible that this can be attributed to the fact that Millport's economy is relatively self-contained. As Millport is an island, some residents will be more reluctant to travel to find employment. Therefore, this may result in more residents deciding to start their own business.

Table 9.4: Local Economy

	Millport	North Ayrshire	Scotland
Employment			
Number of Jobs 2008	330	40,040	2,420,440
% Change 2004-08	-9%	-2%	3%
% Jobs financial & business services	5%	8%	18%
Business Base			
Number of Businesses (2008)	80	3,890	181,470
% Change 2004-08	3%	7%	8%
Businesses per 100 Head of Population	5	3	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

9.19 Table 9.5 shows a breakdown of all jobs by industry in Millport, North Ayrshire and Scotland. The service sector is by far the largest employer in Millport and accounts for a larger share of total employment when compared with North Ayrshire and Scotland. For example, retail & catering accounts for 29% of all jobs in the town, compared with 27% in North Ayrshire and 22% across Scotland as a whole. Other Services in Millport account for some 23% of employment. This is significantly higher than the equivalent rates for North Ayrshire and Scotland, 7% and 5% respectively.

9.20 Levels of manufacturing activity are very low in Millport, with the sector accounting for just 1% of all jobs in 2008. At a national level, the sector accounts for a larger share of jobs (9%). Manufacturing in the wider North Ayrshire area accounts for an even higher share of employment (14%) – this is probably in part attributable to the chemical manufacturing plant in Dalry.

Table 9.5: Employment

	Millport	North Ayrshire	Scotland
Total Number of Jobs 2008	330	40,040	2,420,440
% Agriculture & Energy	0%	2%	3%
% Manufacturing	1%	14%	9%
% Construction	5%	6%	6%
% Retail & Catering	29%	27%	22%
% Transport & Communications	4%	5%	5%
% Financial & Business Services	6%	9%	19%
% Public Sector	31%	30%	30%
% Other Services	23%	7%	5%
Source: Annual Business Inquiry (ABI)			

9.21 The Annual Business Inquiry reveals that less than half (48%) of all employee jobs in Millport were full-time in 2008. This was some way below the regional and national averages where around 68% of all jobs are undertaken on a full-time basis.

Business Base

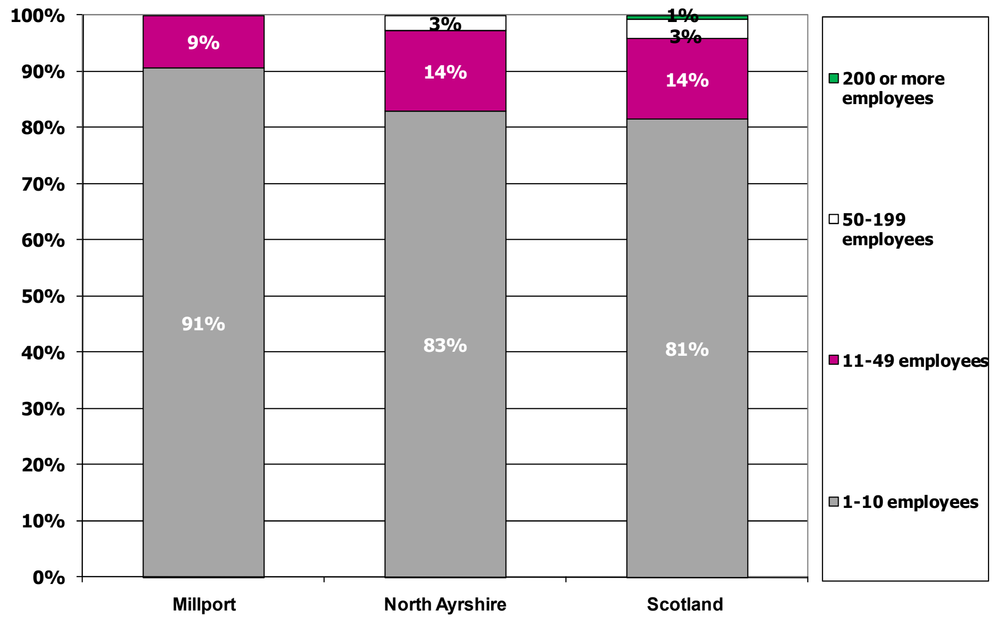
9.22 Figure 9.6 shows the profile of the business base in terms of sizeband in the local area, relative to the regional and national areas. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Millport, these employers account for a larger share of employment (91%), when compared with North Ayrshire (83%) and Scotland (81%).

9.23 On the other hand, businesses in Millport with between 11 and 49 employees account for around 9% of all businesses in the area – below the regional and national averages of 14%.

9.24 In 2008 there were no businesses in Millport which employed between 50 and 199 or more than 200 employees. In North Ayrshire, 3% of businesses employ between 50 and 199 employees – identical to the equivalent Scottish rate.

Scotland is the only area which is represented by businesses employing more than 200 staff (just 1% of all businesses).

Figure 9.6: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))



Tourism

9.25 This section provides an overview of Millport's tourist market, providing some assessment of the recent performance at a regional and national level.

9.26 Unfortunately it is not possible to use the data zone definition to look at the tourism market in Millport as the numbers involved are too small to be disclosed. Therefore, this section looks at the 2003 CAS ward of West Largs and Millport. Table 9.8 shows that the local area's tourism sector employed around 590 people in 2008, representing growth of 12% since 2004. This rate of growth was faster than the across the regional area (4%) and the national area (5%).

9.27 There were around 70 tourism businesses in the local area in 2008 – an increase of around 8% since 2004. This rate of growth outpaced both the regional and national averages of 4%.

Table 9.7: Tourism

Tourism Employment & Workplaces	Millport	North Ayrshire	Scotland
Employees (2008)	590	4,740	215,000
Change in Employees 2004-2008	12%	4%	5%
Workplaces	70	510	19,450
Change in Workplaces 2004-2008	8%	4%	4%
Source: Annual Business Inquiry (ABI)			

Town Centre

9.28 Table 9.8 shows the baseline measures that were available for Millport town centre. With Millport being one of the smallest town centres amongst the case studies, data is very limited. The town was not included in North Ayrshire Council's monitoring of town centre performance.

Table 9.8: Town Centre Baseline Measures

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment	Not regularly monitored Planning applications and building warrant applications available	N/A	Not yet collected
No of Businesses	80	Annual Business Inquiry (2008)	Datazones S1004503 and S1004508
No of jobs	330	Annual Business Inquiry (2008)	Datazones S1004503 and S1004508
Retail Performance			
Rental levels	Not available		
Vacancy levels	25%	Slims Consulting visit Feb 2011	
Range of shops/services	Not available		
Use and Accessibility			
Parking	Not available	NAC	Car park revenue is recorded
Pedestrian Flow	Not available	Various	Footfall counters potentially available in Garrison House.

Linkages and Catalysts for Further Investment

9.29 The project has been developed by the Cumbrae Community Development Company (CCDC) and represents the first step in a series of early actions in the emerging Isle of Cumbrae Development Plan.

9.30 The project has been advanced in conjunction with a number of local partner organisations including North Ayrshire Council, Highlands and Islands Enterprise and Cunninghame Housing Association, and is backed by Business Gateway and the local Community Planning Partnership.

9.31 The project application and our discussion with the project manager suggested that the project was designed to:

- Improve business and tourism facilities;
- Make the town centre more attractive to do business;

- Attract increased footfall;
- Provide better networking opportunities for businesses;
- Provide a high quality artistic and cultural space;
- Bring derelict buildings back to use.

9.32 The project is potentially unique amongst the case studies in that the physical regeneration of the building (which was commenced before TCRF) has acted as the stimulus for the development of a wider community-led regeneration strategy for the whole island.

9.33 The future development of the project – and the town centre – is being actively considered by the Board of the Development Company. The Board are considering how to capitalise on the gifting of a number of properties within the town centre which have the potential to offer rental income to the Trust. The Board is also examining the possibility of improving Millport's branding and raising the quality of the visitor offer.

Project Specific Measures

Table 9.9: Millport: Project Specific Measures

Objectives/ Activities	**Outputs**	**Short Term Outcomes: 2011**	**Interim Term Outcomes: 2013**	**Longer Term Outcomes: 2015+**
The project involves the extension of a lodge house and outbuildings at Garrison House to create a business centre and arts and culture space	Increased spend on (local) suppliers & initial jobs related to regeneration work	Increase business start ups from 2 to 5 on island	Increased inward investment & sustained job opportunities	Increased (inward) investment & sustained job opportunities
	Improved business spaces for events meeting & interacting	Establish 2 account managed business on island	Sustained use of local retail, leisure & cultural facilities	Places where people want to live and work & which enhance their quality of life Stronger economy
	Improved arts and culture spaces for events meeting & interacting	Provide base for Business Forum meetings	Increased footfall at Garrison Centre by 10%	Support increased footfall in town centre
	User friendly buildings that address people's/ organisation's needs	Increase events from 5 to 10 (by 2012)		Locals (& visitors) perceive the town has an improved image

9.34 Table 9.9 shows the project specific measures set out in the project application and additional measures agreed for the project between the research team and the project manager. The quantifiable measures can largely be collected by the Community Development Company.

9.35 The Community Development Company is also looking to identify external assistance to help them develop an evaluation of the contribution that the project has made.

Progress: Jan/Early Feb 2011

9.36 As of May 2010 the project was well underway and was expected to be completed by the end of July 2010. The main contractor leading on the building work went into administration in June 2010, leading to significant delays.

9.37 A new contractor was appointed in late 2010 and the work was complete by the end of January 2011. While the arts and cultural space and the business place are now completed, as yet there are no full time tenants in either space.

9.38 The arts and culture space has been used for a number of small events, particularly over the Christmas period. A new development manager has been appointed by the Community Development Trust and she is currently considering additional uses that could be accommodated within this space as part of a wider programme of activity in Garrison House.

9.39 The business space at the Lodge house is currently being used for Committee meetings of the Community Development Trust and on a part-time basis by the project officer. The trust had successfully applied for additional funding from Highlands and Islands Enterprise to provide office furniture and equipment and increase the suitability of the space for start-up and small businesses.

Conclusions

- The project is largely physical and is the second phase of works, building on the recently successful restoration of Garrison House;

- The project has been completed and the Trust has successfully applied for further funding in support of the project;

- The future development of the projects is being actively considered as part of a wider look at the future of Garrison House and the wider performance of the town centre;

- The Community Development Company has only limited resources to monitor the performance of the town centre. They are considering ways in which they can secure resources to evaluate the impact of the project in the town centre.

Case Study Interview Details

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10 JEDBURGH

Context and Background

10.1 Jedburgh is a town in the Scottish Borders, approximately 10 miles north of the border with England. Located in the central Borders area, and built on either side of the Jed Water, the town had a population of around 4,000 people in 2008.

10.2 The central Borders area is characterised by a network of small towns (of which Jedburgh is one), rather than one single large town. In light of this, the Scottish Borders Structure Plan (2001-2011) identifies three hubs within which future economic development activities will be focussed [16]. Jedburgh is located within the 'Primary Hub' - the preferred area within which future housing, retail and employment generation development is to take place [17]. The Local Plan (2008) for the area indicates that the key development issues within Jedburgh town are centred upon the need for improvements to existing road and transport infrastructure, upgrading of community facilities, expansion of primary school capacity, and protection of existing open spaces. At the same time, the revitalisation of Jedburgh Town Centre is recognised as a priority area for further action.

TCRF Project

10.3 The Jedburgh TCRF project aims to improve the socio-economic performance of the town centre with the delivery of a number of key projects (see Table 10.1 overleaf). The overall project will increase investment into Jedburgh town centre by creating a more viable town centre with additional facilities. In particular:

- The project will enhance Mercat Place as a key civic centre & events space, including the restoration of the Jubilee fountain. In addition, a range of hard and soft landscaping improvements will be implemented around the town centre;

- A high quality destination play area visible from the A68 is being developed and the main car park is being extended;

- Wi-Fi will be installed in the town centre area;

- The Port House complex has been acquired for future business workshop space and community facilities.

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[16] These are the Primary Hub in the central Borders area, the Eastern Hub; and the Western Hub

[17] The Primary Hub comprises the towns of Galashiels, Melrose, Kelso, Jedburgh, Hawick and Selkirk.

Table 10.1: Jedburgh TCRF Project: Key Outcomes
(Source: TCRF Application Form)

Project	Summary of Key Project Outcomes		
Enhancement of Mercat Place	6 additional events	1,200 additional visitors	£15-20k additional revenue
Acquisition of Port House	Phase 1: 1-2 FTE jobs (letting) and income generated from letting	Phase 2: 20 FTE jobs (construction) and 23 FTE jobs (letting)	Phase 2: 14 business supported
Car park expansion (Canongate)	28 additional car parking spaces		
Development of Play Area	Increased usage of play area by 25%		
Digital Connectivity/Wi-Fi coverage	Estimated increase of additional users by 20% on Town website		
Landscaping, signage & orientation	Enhanced orientation/signage	4 key sites improved (car park, TIC area, play area, Canongate)	15% reduction in crime and youth disorder issues in this part of town.

10.4 The project aims to link tourism marketing and business support mechanisms.

10.5 The concept of the Jedburgh TCRF project was originally initiated by the Jedburgh Alliance and Jedburgh Town Community Trust. There is a huge momentum from these organisations to improve the town. There is a great deal of competitiveness and pride amongst Borders towns which has helped to progress the project.

10.6 The project will complement existing work undertaken by the community planning partners within the town and will add real value to the town centre environment. The investment opportunity is crucial not only to support the redevelopment of a vibrant town centre but also to build confidence in the local community.

10.7 Jedburgh is in a key gateway location to Scotland and is well positioned to capitalise on those travelling north and south. It was highlighted that action was required to draw people into Jedburgh town centre and to encourage them to stay. The destination play park will act as an attraction as it is visible from the A68.

10.8 The Trust and Alliance have been aspiring to buy the Port House, a large under used listed building, since 2002. However, they experienced difficulties in obtaining the money to buy the building as opposed to just renovating it. A number of development partnering options were explored, however none of these proved viable.

10.9 Jedburgh Town Centre will benefit from the project with direct benefits for visitors, businesses, and investors as well as those living within the locality, who use the town for shopping and other business purposes. Businesses will benefit from the additional facilities, which will make the centre more vibrant and attractive for visitors. The project will link tourism, marketing and business by the town web-site. This will create opportunities for cross-selling, promotional campaigns and increased trade.

10.10 It is anticipated that the project will attract new investment to shops in the town centre and more events such as farmer and international markets.

10.11 The project application and our discussion with the project contact suggested that the project was designed to:

- Make the town centre more accessible;
- Improve the appearance of the town centre;
- Improve tourism facilities;
- Increase footfall in the town centre;
- Acquire a derelict building to develop for community benefit;
- Install Wi-Fi.

Population

10.12 Table 10.2 reveals that Jedburgh was home to approximately 4000 people in 2009. This represents a decline of around 3% since 2001. By contrast, the population of the Scottish Borders rose by 5% over this period, ahead of the Scottish trend of 3%.

10.13 Fifty-eight per cent of the population of Jedburgh are of working age. This is lower than both the regional and national averages of 59% and 63% respectively.

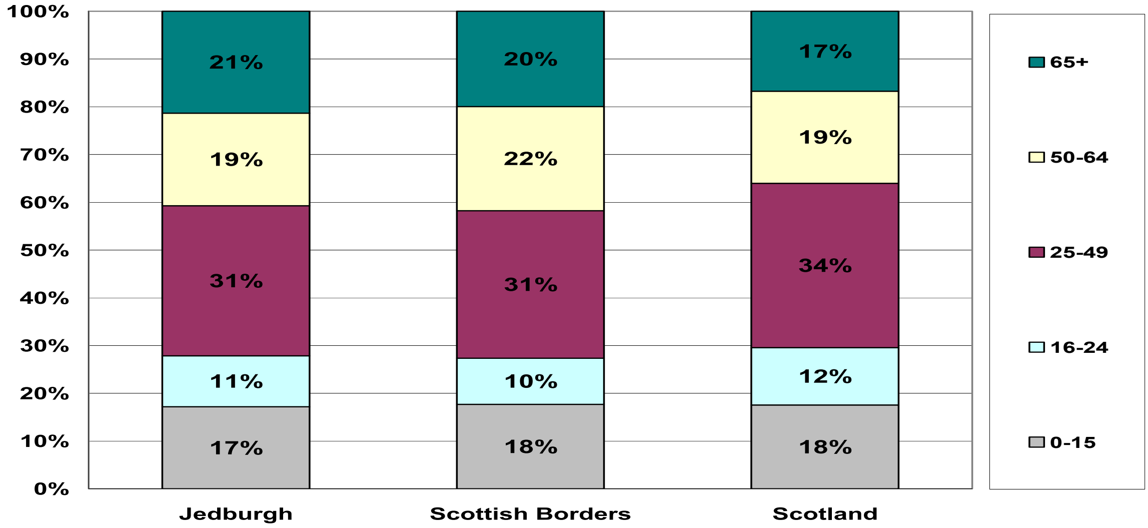
Table 10.2: Population

	Jedburgh	Scottish Borders	Scotland
Total Population 2009	4,000	112,700	5,194,000
Population Change 2001-09	-3%	5%	3%
% Working Age 2009	58%	59%	63%
Sources: ONS Mid-Year Population Estimates			

Age Profile

10.14 Figure 10.3 shows that the age structure of the Jedburgh population is broadly similar to that of the Scottish Borders. Compared with national averages, Jedburgh and the Borders population is characterised by lower shares of residents who are of working age (16-49) and higher proportions of those aged 50-64 and 65+. Similarly, there are lower levels of 0-15 and 16-24 year olds in Jedburgh, when compared to the Scottish average.

Figure 10.3: Age Profile of the Population 2009
(Source: ONS Mid-Year Population Estimates 2009)



Labour Market

10.15 Table 10.4 shows the 2010 labour market participation levels (as measured by employment, unemployment and economic inactivity) in the regional area are generally below the national average.

10.16 Using the benefit claimant rate as a proxy for labour market participation, it can be assumed that labour market participation levels are slightly higher than across Scottish Borders as a whole, and higher than the Scottish Average.

10.17 In January 2010, 3% of all working age residents in the Jedburgh area were claiming the benefit, in line with the equivalent rate for Scottish Borders and below the Scottish average.

10.18 Relative to Scotland, less of the Scottish Borders workforce are educated to degree level, 33% as opposed to the national average of 34%. Similarly, a lower percentage of the Scottish Borders workforce has no qualifications at all – 10%, compared to 13% for Scotland.

Table 10.4: Labour Market

	Jedburgh	Scottish Borders	Scotland
Labour Market Participation			
Employment Rate	N/A	75%	72%
Unemployment Rate	N/A	7%	7%
Economic Inactivity Rate	N/A	19%	23%
Benefit Claimants			
Workless Benefit Claimant Rate	10.5%	10.7%	14.6%
Jobseekers Allowance Claimant Rate	3.1%	3.1%	4.2%
Qualifications of the Working Age Population			
% WAP Qualified to Degree Level or Above	N/A	33%	34%

	Jedburgh	Scottish Borders	Scotland
% WAP with No Qualifications	N/A	10%	13%

Local Economy

10.19 Table 10.5 shows that there were approximately 1,700 jobs in Jedburgh in 2008, representing an increase of 13% since 2008. This rate of increase was greater than for both the region (6%) and Scotland (3%).

10.20 Only 6% of employee jobs in Jedburgh are based within the financial & business services sector. This is below both the regional and national averages, where this sector accounts for 10% and 19% respectively.

10.21 There were 200 business located in the local area (town/town centre or ward) in 2007 which was 2% lower than in 2004. This decline was in contrast to the growth rates experienced in both the region (8%) and Scotland (8%) over the same period.

10.22 However, when compared with the regional and national averages, Jedburgh has a slightly higher business density rate. In 2008, there were five businesses per 100 of the population in Jedburgh. This was above the regional and Scottish averages of four.

Table 10.5: Local Economy

	Jedburgh	Scottish Borders	Scotland
Employment			
Number of Jobs 2008	1,700	42,000	2,420,400
% Change 2004-08	13%	6%	3%
% Jobs financial & business services	6%	10%	19%
Business Base			
Number of Businesses (2008)	200	4,900	181,500
% Change 2004-08	-2%	8%	8%
Businesses per 100 Head of Population	5	4	4
Source: Annual Business Inquiry & ONS Mid-Year Population Estimates			

10.23 Table 10.6 shows a breakdown of all jobs by industry in Jedburgh, Scottish Borders and Scotland. The largest employer in Jedburgh is the manufacturing sector which accounts for 29% of jobs. This percentage is well ahead of the regional average of 14% and national average of 9%. The second largest employment sector is retail and catering which represents 26%, which is equal to the regional percentage and ahead of the national average of 22%.

10.24 Only 15% of the population are employed in the public sector in Jedburgh. This is in contrast to the region (33%) and the Scottish average of 30%.

Table 10.6: Employment

	Jedburgh	Scottish Borders	Scotland
Total Number of Jobs 2008	1,700	42,000	2,420,400
% Agriculture & Energy	1%	2%	3%
% Manufacturing	29%	14%	9%
% Construction	11%	8%	6%
% Retail & Catering	26%	26%	22%
% Transport & Communications	7%	4%	5%
% Financial & Business Services	6%	10%	19%
% Public Sector	15%	33%	30%
% Other Services	4%	5%	5%
Source: Annual Business Inquiry (ABI)			

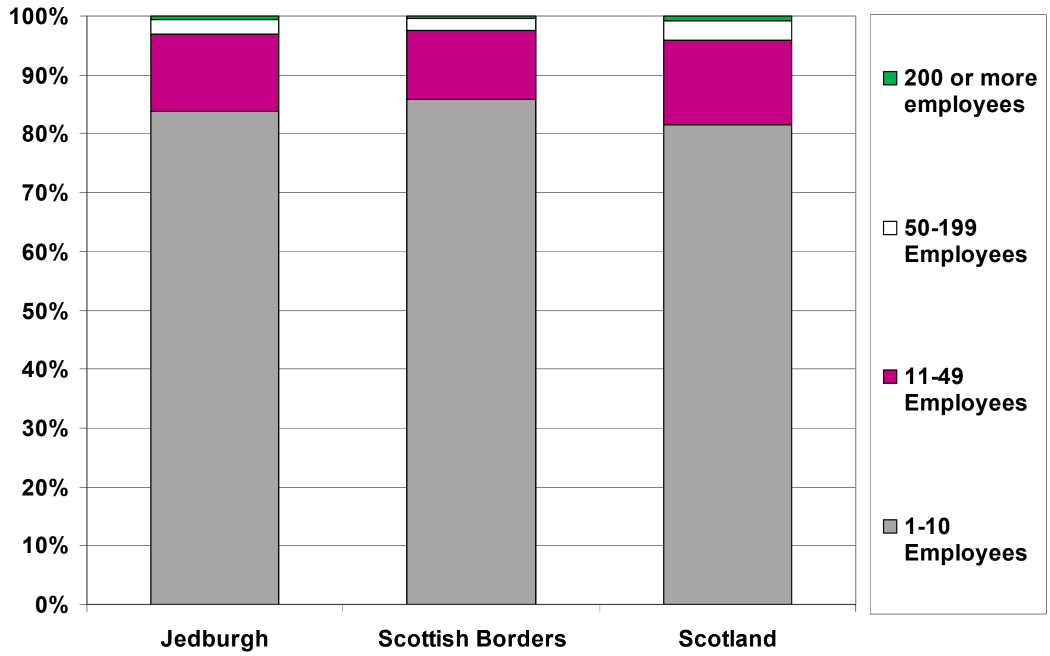
Business Base

10.25 Figure 10.7 shows the profile of the business base in terms of sizeband in the local area, relative to the regional and national areas. It shows that the vast majority of businesses across each of the areas employ between 1-10 people. In Jedburgh, these employers account for a larger share of employment (83%), similar with Scottish Borders (83%) and Scotland (81%).

10.26 Businesses in Jedburgh with between 11 and 49 employees account for around 14% of all businesses in the area as opposed to the regional average of 12% and national average of 14%.

10.27 In 2008, 2% of businesses in Jedburgh employed between 50 and 199 and 1% employed more than *200* employees; this was identical to the equivalent Scottish rate.

Figure 10.7: Businesses by Sizeband 2008
(Source: Annual Business Inquiry (ABI))



Tourism

10.28 This section provides an overview of the tourist market in Jedburgh, providing some assessment of the recent performance at a regional and national level.

10.29 Unfortunately it is not possible to use the data zone definition to look at the tourism market in Jedburgh and so this section looks at the 2003 CAS wards.

10.30 Table 10.8 shows that the local area's tourism sector employed around 200 people in 2008, representing a massive growth of 51% since 2004. This rate of growth was faster than the across the regional area (27%) and the national area (5%).

10.31 There were around 30 tourism businesses in the local area in 2008, which was the same figure as in 2004. Hence, although the number of employees increased by 51%, this could possibly be reflecting a growth in part time working in the sector. This lack of growth was behind both the regional average of 8% and the national average of 4%.

Table 10.8: Tourism

Tourism Employment & Workplaces	Jedburgh	Scottish Borders	Scotland
Employees (2008)	200	3,800	215,000
Change in Employees 2004-2008	51%	27%	5%
Workplaces	30	500	19,500
Change in Workplaces 2004-2008	0%	8%	4%
Source: Annual Business Inquiry (ABI)			

Town Centre

Table 10.9: Jedburgh: Town Centre Baseline Measures (Jan 2010 or proxy)

Measure	Specific Data	Source	Comment
Economic Activity			
Recent Investment		Planning applications and building warrants	Not collected proactively
No of Businesses		Scottish Assessor and Town Centre Retail Study	Not collected proactively
No of jobs	-	-	Not available for town centre
Land use by type	Method required	Local Plan Amendment Settlement Statement	Only available at ground floor level
Retail Performance			
Rental levels	-	-	Not available, although SBC owns some properties
Vacancy levels	13%	SBC Retail Survey	December 2009
Range of shops/ services	52 Class 1 shops 19 Class 2 shops	SBC Retail survey	December 2009

Measure	Specific Data	Source	Comment
	18 Class 3 food		
Retailer requirements	-	-	Not proactively collected
Use and Accessibility			
Parking	Canongate CP 0% of weekday counts > 85% full 8% of Saturday counts > 85% full Murray's Green CP 58% of weekday counts > 85% full 0% of Saturday counts > 85% full Lothian CP 0% of weekday counts > 85% full 0% of Saturday counts > 85% full	Car park survey due	SBC Technical Services Department
Pedestrian Flow	208 (index) (taken at RBS for one week)	SBC/ PMRS	Data for October 2009 covers 12 locations and 3 periods.

Linkages & Catalyst for New Investment

10.32 Scottish Borders Council is now more proactive in tourism promotion and the project is linked to the events forum, which helps promote and attract events to the town.

10.33 The Port House will have to be commercially viable. Alba Conservation Trust is undertaking an options appraisal in order to find a feasible occupier mix. It is important to provide something different for the town that will be flexible moving forward. This part of the TCRF will trigger Lottery, ERDF and other match funding. There may also be a role for a town co-ordinator to be employed by the Trust.

10.34 The Port House has been bought, therefore the next stage can be progressed and new investment can be obtained to refurbish the building. However, obtaining further funding to ensure successful end use of the building is an uncertain process. It is anticipated that the project will attract new investment to shops in the town centre and more events such as farmer and international markets. It is likely that the pub operation which has its beer garden adjacent to the destination play area will be refurbished.

10.35 The Jedburgh Alliance had been looking at ways of improving Jedburgh Town centre long before the recession hit. Therefore, the TCRF project is just one of many strategies that the Alliance is involved in: for example, they are looking at taking over the town hall and museum. George Bert's view, the Chairman of the Alliance, was that the TCRF is a great idea and has proved a significant boost to a number of towns at a very tough time. He felt that as a result of the short timescales it was difficult to undertake the required level of supporting work in order to make a 'fresh' TCRF application. Therefore, it was easier for projects that had already been worked up and were waiting for funding, as opposed to new projects that had come forward in direct response to the TCRF fund.

Table 10.10: Project: Jedburgh Town Centre Regeneration Project: Performance Indicators

Objectives	Performance Indicators Gathered/available: Before & After	Source
The project aims to improve the socio-economic performance of the town centre with the delivery of a number of key strategic projects identified as priorities for Jedburgh.	Increase footfall	SBC Town Centre Retail Study
	Number of businesses in town centre	SBC Town Centre Retail Study
	Increased units in retail use	SBC Town Centre Retail Study
	Improved visitor perception of town centre	*Proposed Survey*
	Improved residents' perception of town centre	*Proposed Survey*
	Increased events in TC	SBC & JT
	Rental income for Port House	Port House Business Plan
	Stabilised/increased lets/use of Port House	Port House Business Plan
	Jobs Created by Port House	Port House Business Plan

Notes
Indicators that SBC need to measure in the future are indicated in *italics.*

Addressing Theory of Change

10.36 The table below summarises the review of outputs and outcomes using the emerging Theory of Change (public realm, accessibility and townscape and business space models).

Table 10.11: Jedburgh Town Centre: Project Specific Measures

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes	Measure In Place
To improve the socio-economic performance of the town centre with the delivery of a number of key strategic projects	Enhancement of Mercat Place	Key public places are protected, publicised and accessible	Increased awareness and knowledge of town heritage and quality of buildings	Sustained use of local retail and improved business performance	*Proposed survey*
	Restoration of Queen Victoria's Jubilee Fountain	Increased attractiveness of the town centre	Improved visitor perception of town centre	Improved residents and visitors perceptions	*Proposed survey*

Objectives/ Activities	Outputs	Short Term Outcomes: 2011	Interim Term Outcomes: 2013	Longer Term Outcomes	Measure In Place
identified as priorities for Jedburgh.		Increased social interaction/ sense of identity			
	Extension of Cannongate car park	Increased accessibility to the town centre	Increase footfall/ spend	Increased spend	Traffic Survey
	Development of high quality destination play area	Increased awareness, perceived value & use of service	Increased no. of, stability & mix of residents and visitors	Increased spend in TC	*Proposed survey*
	Installation of Wi-Fi	Increased Wi-Fi connectivity	Locals and visitors use space, meet more and increased interaction	Increased number of visits to TC	*Monitor through number of visits to Wi-Fi homepage* *Proposed survey*
	Landscape Improvements	Increased sense of pride and care of the space	Improved visitor perception of town centre	Increased spend in TC	*Proposed survey*
	Acquisition of Port House complex for business workshop space and community facilities	Increased spend on local contractor, supplies & initial job related to regeneration work	Business space fit for purpose Sustained employment in local business Increased income for local business	Increased inward investment for retail and sustained job opportunities	Port House business plan

Notes
Indicators that SBC need to measure in the future are indicated in *italics.*

Progress: Jan/Early Feb 2011

10.37 Progress of the Jedburgh project at January 2011 was as follows:

10.38 Completed works of the Jedburgh project include the development of the destination play area, the extension of the town centre car park and the various landscaping works.

10.39 The enhancement of Mercat Place as a civic centre and events space was largely completed in April 2010. However, there are still some specialist granite elements of the fountain which require to be completed.

10.40 Wi-Fi installations have largely been completed but have been delayed due to winter weather and listed building issues.

10.41 The Port House complex was successfully acquired and has been made weather proof. Further funding will be required to fully convert the building, however, the ground floor unit is now available for let.

10.42 Due to the listing of the fountain in Mercat Place not being taken into consideration a small delay to the works was experienced.

Conclusions

10.43 As a result of an increased buzz in the town due to the TCRF project a number of new projects are now being proposed in the town:

- Pedestrianisation of the road leading to Jedburgh Abbey;
- A skate park is proposed as a result of the success of the destination play area;
- A bid for Lottery funding - "growing community assets" will be made to progress the Port House project;
- The purchase of further buildings is being considered.

10.44 It would have been beneficial to the running of the project if:

- Some of the TCRF guidance had been clearer;
- The project had not run over the winter months;
- Signage outside the town centre to compliment the town centre improvements was allowed.

10.45 In terms of monitoring the project there is nothing new in place right now. However, once everything is complete a robust programme is intended to be put in place. There is a legal agreement between Scottish Borders Council and Jedburgh Trust which states that Jedburgh Trust must set up a method to monitor and evaluate some of the proposed outputs.

Case Study Interview Details

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11 CASE STUDIES: OVERALL CONCLUSIONS:

11.1 The Research Team was commissioned to scope out the nature of the outputs and longer term outcomes, to understand how town centre regeneration works and what it can achieve. The purpose of the research is to develop a clearer understanding of the activities taking place as part of town centre regeneration and the outputs and outcomes that follow on from this. The impetus for the research was the Town Centre Regeneration Fund (TCRF) and therefore the research aims to identify and measure progress towards the outcomes of the interventions supported by TCRF; however, the research also aims to draw out and explore wider lessons for town centre regeneration.

11.2 This report was prepared as part of Stage 4 of the research and summarises the baseline position in the nine case study areas and the TCRF projects that have been selected. Fieldwork in the nine Case Study areas was originally undertaken during late April/early May 2010 and the Case Study areas were revisited in January/early February 2011. The baseline position for each of the case studies is summarised in Chapters 2-10. The key overall conclusions from this final stage of the research are summarised below and have helped to shape the conclusions, findings and recommendations of the Final Report that is presented separately.

TCRF & TCRF Projects Origins

11.3 In all nine case studies the TCRF projects were not developed specifically for the TCRF submission and the projects were mostly opportunistic and had their roots in a number of earlier strategy documents. Therefore, in most cases the TCRF projects sit within a relatively clear town centre strategy that includes a vision and forward/action plan for the particular town centre.

11.4 Many of the Local Authorities specifically filtered out potential projects that were not capable of being delivered within the original six to nine month timescale. This will have helped determine the types of projects that were presented to the Fund at the application stage and the eventual selection of successful projects. In essence, the TCRF will have funded projects that were already developed and capable of quick delivery.

11.5 Working up the TCRF project applications and being successful in obtaining funding has, in most cases, significantly improved relationships with key town centre partners and, in some cases, given the town's residents and business renewed confidence and an appetite for further regeneration. On a number of occasions, local authorities actively canvassed opinion from stakeholders on other projects that could be delivered.

11.6 The development of the TCRF bids involved the commitment of significant staff time on the part of the projects, particularly given the compressed timescales. There is **evidence from some projects that the timescale also compressed the ability of projects to negotiate value for money** in some contracts. On the other hand, other projects stated that they were able to negotiate good value for money (see paragraph 11.8).

11.7 The **'pivotal' nature of TCRF** in some cases is acknowledged in that some projects would not have proceeded without TCRF funding. TCRF was also widely attributed with **bringing projects to fruition faster than would have otherwise have been the case**.

TCRF Project Delivery

11.8 In all of the case study areas, TCRF contractual commitments had been completed by 31 March 2010; however, five of the case studies have projects that have been **delayed and will not be completed by the end of March 2011** (see Table 11.1: Town Centre Research: Case Studies Overview). **Therefore, it will be some time before the individual case studies project's outcomes and impact can be fully assessed.**

Table 11.1: Town Centre Research: Case Studies Overview

Case Study	Pop-ulation (2008)	Town Type (SG Urban Rural Classification & Experian)	Projects	Progress	Town Centre Regeneration Future Strategic Themes
1.Stromness	1,950	Remote Rural Growing Gateways	• Public realm works • Ducting for IT infrastructure	Delayed: full completion July'12	• Tourism/visitors: cruise ships • Pierhead Gallery • Renewables • Pierhead Regeneration • Existing Townscape Heritage Initiative
2. Elgin	21,000	Accessible Small Town	• Streetscape upgrade • Services to events space • Gateway to centre • Shop front improvement • Street cleaning machines • Electronic tourism info. points	Completed	• Improving accessibility/ attractiveness • Stem leakage of spend • RAF Base Closures • Existing BID
3. Kirkcaldy	50,600	Other Urban City Fringe Tenacity	• Streetscape • Green corridor • Visitor signage	Phase 1: complete Phase 2: April'11	• Strengthen service economy • Stem leakage of spend •

Case Study	Pop-ulation (2008)	Town Type (SG Urban Rural Classification & Experian)	Projects	Progress	Town Centre Regeneration Future Strategic Themes
4.Kirkintilloch	19,900	Other Urban Commuter Comfort	• Infrastructure works EDC/KI site • Town Hall into use • Public realm works	Mostly complete	• Boost local economic performance • Improve as visitor destination • Concentrating retail provision
5. Govan	66,000	Large Urban Cities: *Restructuring*	• Pearce Institute roof • Public realm: Square • Public realm: Shopping Centre • Public realm: Station/ Interchange	Mostly complete PI: April '11	• Central Govan Action Plan • Southern Attractiveness appearance of arrival point • Transport Museum, Southern General & Pacific Quay investment • Existing Townscape Heritage Initiative • Potential BID
6. Barrhead	18,100	Small Urban Settled Communities	• Main Street shops • Main Street public realm • Main Street: shopping centre • Business centre • Cross Authurlie: Public realm • Cross Authurlie: Site acquisition/demolition	3/4 Projects complete	• Town transformation: housing/ business space/ College • Potential BID
7. Airdrie	36,400	Other Urban	• Mixed use development: demolition/new build	Delays: March'11	• Improve economic performance
8. Millport	1,400	Remote Rural	• Second phase works to Garrison House	Completed	• Focus on small indigenous business & community development

Case Study	Pop-ulation (2008)	Town Type (SG Urban Rural Classification & Experian)	Projects	Progress	Town Centre Regeneration Future Strategic Themes
9. Jedburgh	4,000	Accessible Small Town Rural Challenge	• Improvements to civic centre/events space • Business/ workshop space & community facilities • Expanded car parking • High quality children's play area • Town centre Wi-Fi internet • Landscaping, signage, orientation	Completed	• Improve socio-economic performance

11.9 A number of case study contacts pointed out the 'advantage' to the client who is procuring the contracted capital works of particularly competitive tendering in a recession and the resultant 'saving' on anticipated project costs.

11.10 Generally, across the nine case studies, the quality of monitoring and evaluation of the impact of projects on actual outcomes was variable despite claims in the original TCRF applications that robust monitoring and evaluation frameworks would be put in place. Initially, and in most cases, the case study contacts had made only very rudimentary monitoring and evaluation plans. Among the exceptions are Govan, Barrhead, Kirkcaldy and Kirkintilloch. The follow up discussions with the case studies in January/early February 2011 confirmed in most cases the willingness in principle of the case study contacts to adopt the emerging framework for longer term monitoring and evaluation and collect the appropriate data. This was subject to adequate specialised staff, time and resources being available which is likely to be more challenging in the future in the 'era of austerity'.

Monitoring & Evaluation: Theory of Change

11.11 In contrast, the **contract monitoring** across the nine case studies was generally very good. Part of the explanation for this is the real focus of the 'project officers' on delivering projects and capital spend in the short/medium term rather than a focus on moving towards actual outcomes using a robust monitoring and evaluation framework. There is also something of a lack of a corporate view across the various Local Authority departments when it comes to town centre monitoring and evaluation and in some cases it is given lower priority and limited resources.

11.12 Rarely across the case studies had there been any attempt to link the longer term outcomes to the activities actually delivered. For example, there is often a limited explanation of the reach and influence that the TCRF projects are likely to have achieved or much clarity on intended beneficiaries (for example retail/service businesses, local employers, youth and residents).

11.13 Therefore, the main conclusions from the Case Studies research are:

- The timescale of the study means that it is too early to evaluate the success or otherwise of the TCRF projects;

- The quality of approaches to monitoring town centre performance and specifying project outputs and outcomes was variable at the outset. However, over the course of the study there have been a number of improvements;

- There is some emerging evidence of LA's taking a more rigorous approach to town centre performance;

- The case study visits and discussions with the contacts have helped bring greater clarity and focus to short and medium term output and outcome measures in the selected towns;

- The contacts in the case study areas have in the main begun to think more coherently about bring these elements together to evaluate the impact of the projects; and

- There are likely to be resulting resource and skills implications.

11.14 These issues are considered in detail in the Final Report for this research which is available as a separate document.

11.15 If a programme like TCRF is to be repeated then the main suggestions for Scottish Government **coming from the case study contacts** are:

- The aim should be to build on the experience of TCRF so far and look to a 3/4 year rolling programme to allow better strategic planning;

- Phasing the funding over 3/4 years would allow more considered responses, designs and other potential investment (lighting, seating etc);

- Need to allow a longer timescale for the TCRF application process to ensure the full potential of projects and design issues are resolved;

- Practitioners need to learn how to use Theories of Change as part of the project planning process and to follow through on monitoring and evaluation.

APPENDIX
CENSUS AREA STATISTICS (CAS) WARDS & DATAZONES

Airdrie CAS Wards
23C42 : Academy
23C43 : Airdrie Central
23C50 : Calderbank
23C44 : Clarkston
23C49 : Craigneuk and Petersburn
23C45 : New Monkland West
23C47 : North Cairnhill & Coatdyke
23C52 : Salsburgh
23C48 : South East Cairnhill & Gartlea
23C41 : Whinhall

Airdrie Datazones			
S01004723	S01004739	S01004740	S01004743
S01004747	S01004752	S01004754	S01004756
S01004759	S01004760	S01004764	S01004766
S01004767	S01004768	S01004769	S01004771
S01004773	S01004776	S01004777	S01004778
S01004780	S01004781	S01004782	S01004785
S01004786	S01004788	S01004789	S01004790
S01004793	S01004795	S01004796	S01004797
S01004798	S01004800	S01004802	S01004803
S01004804	S01004805	S01004806	S01004807
S01004812	S01004814	S01004817	S01004818
S01004819	S01004820	S01004824	S01004826
S01004828			

Kirkintilloch CAS Wards
11C13 : East Harestanes and Twechar
11C11 : Hillhead and Broomhill
11C14 : Kirkintilloch Central
11C15 : Lenzie
11C12 : Rosebank and Waterside
11C10 : West Kirkintilloch and Torrance

Kirkintilloch Datazones			
S01001479	S01001485	S01001487	S01001490
S01001492	S01001493	S01001494	S01001497
S01001500	S01001502	S01001503	S01001504
S01001505	S01001506	S01001509	S01001510
S01001512	S01001513	S01001514	S01001516
S01001520	S01001522	S01001524	S01001525
S01001531			

Millport CAS Wards
22C27 : Largs West and Cumbrae

Millport Datazones	
S01004503	S01004508

Barrhead CAS Wards
13C06 : Auchenback
13C04 : Barrhead Central
13C05 : Barrhead East
13C02 : Barrhead North
13C03 : North Neilston and West Arthurlie

Barrhead Datazones				
S01001732	S01001744	S01001753	S01001765	S01001785
S01001733	S01001747	S01001757	S01001770	S01001786
S01001741	S01001749	S01001759	S01001776	S01001787
S01001742	S01001750	S01001760	S01001778	S01001788
S01001743	S01001751	S01001761	S01001783	S01001789

Elgin CAS Wards

21C02 : Elgin - Bishopmill East
21C01 : Elgin - Bishopmill West
21C03 : Elgin - Cathedral
21C04 : Elgin - Central West
21C06 : New Elgin East
21C05 : New Elgin West

Elgin Datazones

S01004255	S01004288	S01004295	S01004303	S01004310
S01004277	S01004289	S01004296	S01004304	S01004311
S01004280	S01004291	S01004297	S01004305	S01004315
S01004282	S01004292	S01004299	S01004306	S01004316
S01004283	S01004293	S01004300	S01004308	
S01004284	S01004294	S01004302	S01004309	

Govan CAS Wards

17C51 : Drumoyne
17C52 : Govan
17C53 : Ibrox
17C54 : Kingston
17C70 : Langside
17C64 : Maxwell Park
17C72 : Newlands
17C71 : Pollokshaws
17C65 : Pollokshields East
17C68 : Strathbungo

Govan Datazones

S01003104	S01003163	S01003210	S01003304	S01003367
S01003118	S01003166	S01003211	S01003315	S01003375
S01003126	S01003168	S01003220	S01003316	S01003384
S01003129	S01003170	S01003222	S01003319	S01003386
S01003132	S01003171	S01003227	S01003320	S01003388
S01003133	S01003173	S01003229	S01003322	S01003396
S01003137	S01003176	S01003232	S01003324	S01003411
S01003138	S01003177	S01003234	S01003327	S01003412
S01003139	S01003183	S01003236	S01003338	S01003418
S01003141	S01003186	S01003242	S01003346	S01003424
S01003146	S01003187	S01003256	S01003348	S01003436
S01003149	S01003189	S01003257	S01003349	S01003441
S01003153	S01003192	S01003280	S01003351	
S01003154	S01003196	S01003286	S01003357	
S01003156	S01003200	S01003302	S01003364	
S01003157	S01003207	S01003303	S01003365	

Jedburgh CAS Wards

05C10 : Jedburgh and District East
05C11 : Jedburgh and District West

Jedburgh Datazones

S01005387	S01005388	S01005389	S01005390	S01005391

Kirkcaldy CAS Wards
16C34 : Bennochy and Valley
16C37 : Cardenden, Cluny and Chapel
16C39 : Dunnikier
16C43 : Dysart and Gallatown
16C42 : Glebe Park, Pathhead and Sinclairtown
16C40 : Hayfield and Balsusney
16C31 : Kinghorn and Invertiel
16C32 : Linktown and Kirkcaldy Central
16C33 : Raith and Longbraes
16C41 : Smeaton and Overton
16C35 : Templehall East
16C36 : Templehall West

Kirkcaldy Datazones				
S01002686	S01002731	S01002749	S01002767	S01002784
S01002706	S01002732	S01002751	S01002768	S01002787
S01002709	S01002733	S01002753	S01002769	S01002788
S01002713	S01002735	S01002754	S01002770	S01002789
S01002714	S01002737	S01002755	S01002771	S01002793
S01002717	S01002738	S01002756	S01002773	S01002795
S01002720	S01002741	S01002758	S01002774	S01002797
S01002722	S01002742	S01002759	S01002775	S01002800
S01002724	S01002743	S01002761	S01002776	S01002802
S01002726	S01002744	S01002763	S01002779	S01002806
S01002727	S01002746	S01002764	S01002780	S01002810
S01002729	S01002747	S01002765	S01002781	
S01002730	S01002748	S01002766	S01002782	

Stromness CAS Wards
24C09 : Stromness North
24C10 : Stromness South, Graemsay and North Hoy

Stromness Datazones		
S01004948	S01004951	S01004956

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